

Collaborative Value Creation: How Arts and Business Organisations Create Value for Society

By

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DECLARATION

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ABSTRACT

Since its instigation by patrons supporting struggling artists centuries ago, the relationship between arts and business has been marked by dilemmas of who benefits from the value created. The perceived self-interested regard that blighted the magnanimous acts of the pioneers of arts philanthropy has transformed into outright scepticism with the move towards 'selfish capitalism' in the 1970's. Despite the financial assistance, ubiquitous in society is the perception that business exploits the arts for window dressing purposes.

This thesis studies value creation through transactional collaboration, focusing on the arts context. The contradictions in the phenomenon are examined to construct an understanding of how the organisations working together can lead to societal betterment. Utilising a multi-method interpretive strategy, the thesis presents a conceptual framework of the principles, manifestations and functions of the business partner in societal value creation through transactional arts and business collaboration. The thesis argues that transactional collaboration can and does generate value that can contribute to societal betterment. The stipulations relate to transactional hybrids and collaboration portfolios at the organisational level, and a co-creative response to the process of value creation of beneficiaries. Transient value and cumulative value are two distinct value modes. Cumulative value can induce sustainable societal betterment when business assumes the role of a benefits provider. Human factor and organisational learning condition cumulative societal value creation in transactional collaboration.

The thesis contributes to the literature on cross-sector collaboration by highlighting the importance of hybrid relationships and relationship portfolios in creating societal value in transactional collaboration. It also demonstrates that the beneficiary-centric standpoint is a salient factor when developing a holistic understanding of how collaboration contributes to societal betterment. As such, contributions are made to the value creation literature by showing the salience of the co-creative response of the beneficiary to the process of value creation in relational contexts. Managerial and policy implications, and future research avenues are also proposed.

Keywords: arts and business collaboration, NPO-business collaboration, collaborative value creation, societal value creation, arts value, socio-sponsorship, beneficiary-centric analysis, relational perspective, collaborative value modes

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CHAPTER 1: THE VALUE DILEMMA OF ARTS-BUSINESS COLLABORATION



Picture 1: One of a series of images related to the row over BP sponsorship of the Tate Modern.



Picture 2: Primary school children showcasing their artwork from arts classes provided through collaboration between arts and business

1.1 Introduction

This thesis studies societal betterment through NPO-business collaboration in the arts sector. It considers how transactional collaboration can deliver social good that is capable of inducing societal betterment (Austin 2010). This can be achieved by generating innovative solutions to transform the problematic beliefs and structures inherent in the status quo (Pol and Ville 2009). This relatively new paradigm of dealing with societal challenges centres on collaborative convergence across sectors occurring in today's society and attempts to learn and borrow from different societal sectors. As observed by Selsky and Parker (2005), the established autonomous sectoral organisation no longer suffices in solving increasingly complex social problems, such as the challenge of sustainable community development. One example of this is the community degradation observed in the South Wales Valleys following de-industrialisation in the 1990s. This has emerged as a complex sustainability challenge in light of the persistent failure of government policies to regenerate the area (Walkerdine 2010; Walkerdine and Jimenez 2012).

Brenkert (2002) defines social problems as a deficiency and a lack of provision for the wellbeing of individuals and/or society at large. It is, however, beyond the scope of the thesis, and indeed not the intention, to address all social issues facing society generally. Amongst a multitude of contextual settings, the arts have the potential to serve as the basis upon which NPOs and businesses collaborate to offer innovative solutions to social issues and to create societal value (Şişmanyazıcı-Navaie 2004; Sicca 2000). It has been suggested, however, that the ability of arts and business organisations to generate societal value through collaboration, is mediated by the specific characteristics through which the relationships are structured and governed. It requires that both organisations have a highly developed understanding of value-adding through collaboration (McNicholas 2004; Porter and Kramer 2006, 2011; Austin and Seitanidi 2014). Accordingly, nonprofit arts organisations (NPOs) need to progress from being viewed as bodies that rely solely on grants and largesse and are now proactive partners able to utilise their unique value offering (Farrelly and Quester 2005; Weinstein 2010). Likewise, the business partners need to integrate social objectives into their business value propositions to progress to societal value creation. This gradual reorientation within the sectors has resulted in closer and more

complex forms of interactions between arts NPOs and businesses which have increased the capacity of collaboration to contribute to societal betterment. The next section will examine how this has emerged in the arts context.

1.2 The value dilemma of arts and business collaboration

Art will always exist in society as an intrinsic outcome of human activity (Martorella 1996a; Carey 2005). The perception of the arts as an “essential public good” (Klein, Taylor and Warren 2005: 4) has historically been reflected in the efforts of its diverse patrons to sustain its presence in society. Art patronage makes the arts and business old companions. Dating back centuries to the Renaissance period, wealthy businessmen in a private capacity supported struggling artists in society (Martorella 1996a). Similarly today, many arts organisations follow “a social mission that does not necessarily optimize its financial performance” (Weinstein 2010: 31). The support of arts patrons remains crucial to sustain operations (Roppo and Sauer 2003; Preece 2010; Kim 2009).

More recently, however, the traditional donor-recipient approach has shifted towards a more engaged and collaborative paradigm. It is distinct by mutually reciprocal relations where the traditionally opposing value frames converge through creating value synergistically (Austin and Seitanidi 2014) in pursuit of generating shared value (Porter and Kramer 2011). According to Martorella (1996a: 3), the perceived convergence in the arts context dates back to the 1960s, which witnessed unprecedented corporate growth worldwide. The new age ‘corporate philanthropy’ was initially aimed primarily at the high arts and was fuelled by symbolic and hedonistic benefits linked to the drive to affirm an enlightened status of the new social elite and a desire for pleasurable experiences (Boorsma 2006). Corporations invested monies not only in individual artists by commissioning artworks and hosting artists in residence, but also provided support to theatre, dance, music and opera organisations (Martorella 1996b). Corporate philanthropy supported the arts to better attain its social mission in society through improved artistic provision. Although no longer implying “an unselfish regard for the welfare of others” (Burlingame and Frishkoff 1997: 97), the support, driven largely by the personal motives of the executives

(Cantrell, Kyriazis, Noble and Algie 2008), remained in the social, as opposed to the bottom line linked realms.

However, with the progress of the market economy, the role of the arts sector as a contributor to the economy began to change. As well as its unique experiential and developmental benefits, the arts became noted for generating employment (Martorella 1996b). They also emerged as a significant contributor to socio-economic development (McCarthy, Brooks, Lowell and Zakaras 2001). As Throsby (2006) argues, cultural capital – whether it is tangible (paintings, sculptures, heritage buildings) or intangible (performing arts, literature, as well as networks and relationships arisen from cultural activity) – can be consumed and it can also help build and energise communities. This re-interpretation of the arts organisations' role in society mobilised corporate leaders to assume a greater presence within the arts sector both as consumers and supporters. The zeitgeist of the new era of arts and business interactions is embodied in the establishment of the UK's Association for Business Sponsorship of the Arts (now Arts and Business) in 1976. This aimed to stimulate stronger engagement between the arts community and the private sector. In the UK, the value of corporate arts support has grown from £600,000 in 1976 to around £686m today (Arts and Business 2014a).

However, the grantor-grantee approach adopted in the majority of the interactions relegated arts organisations to a position where they were the sole recipient of benefits in the relationship. The resultant power asymmetries in these relationships made many artists and arts organisations vulnerable to the fortunes and whims of the corporate supporters (Useem 1988). During the economic downturn of the late 1980s, much corporate giving was scaled back and small arts organisations in particular struggled to cover the funding deficit. The scale to which small arts organisations began disbanding prompted government calls for the business community to engage with the arts community as part of its overall responsibilities to society. The government agenda helped to reinforce support for the arts as one of the principal areas of corporate social responsibility (Carroll 1991), yet it also increased competition for the already diminished corporate funding (Bussell and Forbes 2006). To sustain operations, more progressive arts organisations engaged in professionalisation efforts by adopting mainstream marketing tactics and business strategies (Colbert 2003a; McCarthy et al. 2001; Rentschler, Radbourne, Carr and Rickard 2002). With the help of the strategic acumen provided by the existing business partners as

part of the in-kind support, these arts organisations improved their corporate funding competitiveness by designing value offering based on the attractiveness to the existing and potential business partners (Hobday 2002; Roppo and Sauer 2003; Bussell and Forbes 2006; Finley, Gralen and Fichtner 2006; Kim 2009; Preece 2010; Weinstein 2010).

These unprecedented changes in the interactions resulted in novel, more mutually regarding relationships that were better embedded in both organisational cultures. A relationship between Aeroplan, a loyalty marketing company, and Tapestry New Opera, a contemporary performing arts organisation, reported by Preece (2010), provides anecdotal evidence of such progress. Following a prolonged period of interactions at arm's length, Tapestry made a request to Aeroplan for significant financial help with a special event. Aeroplan challenged Tapestry to come up with a project where the organisations would work together to creatively commemorate the event. The close co-operation required for the project resulted in a better understanding and appreciation of each other's work. Creativity forged a bond between the organisations and became the basis for the future of their relationship which in turn helped revitalise the stagnant organisational culture at Aeroplan. The long-standing traditional sponsorship transformed into a novel and collaborative relationship with invaluable outcomes for both parties (Preece 2010).

Evidently, the unilateral flow of resources from the business partner becomes increasingly reciprocal in these new approaches. Furthermore, these progressive interactions generate outcomes beyond the partnering organisations (Seitanidi and Ryan 2007; Austin and Seitanidi 2014). By reciprocating benefits, arts organisations can reclaim a more equal standing and assume greater ability to direct the collaboration towards improving social provisions related to their mission. All types of arts and business interactions can create socio-economic value, but how it is created and its magnitude and potential varies across different forms of interactions.

Pictures 1 and 2 (page 3) portray the phenomenon of arts and business interactions. However, the type of collaboration, the partners' motivations behind the collaboration, the processes involved and the value created for society differ significantly. Picture 2 illustrates growing anecdotal evidence that some organisations within both sectors have progressed in their organisational learning beyond the self-interested motivations towards the developmental potential of the arts (Şişmanyazıcı-Navaie 2004; A&B 2014b). This agenda appears to have so far eluded focused academic investigation. Beyond some organisational

level factors (Kim 2009), little is known about the societal effect of these relationships. The thesis attempts to start unravelling some of these questions and this is encompassed in the statement of the research problem outlined below.

1.3 Study rationale and the research problem

The study aims to examine how arts and business collaboration creates value that can contribute to societal betterment. Societal value creation, therefore, forms the broad context of this study. This study makes the central assumption that all arts and business interactions generate socio-economic benefits and the multidimensional nature of these interactions influences the worth of the value for society. The interactions extend from simple donations to complex interactive relationships that can be plotted along a continuum of NPO-business interactions based on their structural and governance characteristics (Austin 2000), which helps to determine their societal value creation capabilities (Austin and Seitanidi 2014).

The complexities and controversies surrounding value creation in NPOs and business interactions in the arts context present various research challenges, yet it offers a fascinating and important research subject as it promises positive outcomes for society. Although much debated in praxis, value creation in this specific situation has escaped comprehensive academic investigation. Extant studies have so far largely focused on the organisational level outcomes and typically examine business benefits (e.g. Kushner 1996; Martorella 1996b; Leclair and Gordon 2000; O'Hagan and Harvey 2000; Moir and Taffler 2004; Knight 2010). Benefits for the arts organisations, particularly from an arts perspective, are less well documented (e.g. Roppo and Sauer 2003; Preece 2010), with a marked paucity of studies that provide a balanced view (e.g. Kim 2009; Weinstein 2010). In addition, extant literature shows a lack of knowledge about how nonprofit arts organisations and business create value together to produce positive and sustainable outcomes for society (Milner 2002).

This is perhaps unsurprising due to the still emergent nature of the cross-sector collaborative value creation field. Value creation in NPO-business collaboration has only recently been conceptualised (Austin and Seitanidi 2014). It remains in need of

development as to what constitutes value for society and how it is generated, both conceptually and empirically. There are questions related to how collaborative value creation operates in different social contexts (Austin 2000; Nelson and Zadek 2000; Zadek 2004; Kourula and Halme 2008) and how it is perceived by different stakeholders (Le Ber and Branzei 2010a, b; c.f. Peloza and Shang 2011). It is also important to examine the influence of the different approaches to collaboration on societal value creation (Seitanidi 2010), as well as how the abundant success factors translate to collaborative value creation (Austin and Seitanidi 2014). These all require further clarification. By examining the positive impact of NPO-business collaboration on societal betterment, the thesis focuses on the value outcomes of these relationships, although the processes and factors that influence the outcomes need to be considered (Seitanidi and Ryan 2007; Kolk et al. 2010). Literature provides some indications about the multidimensionality of value outcomes but the micro processes of how benefits generated on different levels operate value that contributes to societal betterment are not widely understood (Seitanidi 2008; Kolk et al. 2010; Vock, van Dolen and Kolk 2011). Studies indicate that collaborating organisations need to consider the different effects of output (the number of employees participating in skills exchange or the number of target beneficiaries taking part in a creative workshop), outcome (improved employee morale, system efficiencies, and the more widespread awareness of the addressed issue) and impact (new business benchmarks, environmental policies and other codes of practice, and individual wellbeing) in claiming contributions to society. The most valuable is the final effect of the incremental changes is the long-term 'impact' at individual, organisational and societal level. The systemic changes inherent in the impact dimension essentially shapes the driving force behind the collaborative turn in governance and it is the societal impact that determines the legitimacy of cross-sector interactions (Ashman 2001; Selsky and Parker 2005, 2010; Kolk, van Tulder and Kostwinder 2008; Austin and Seitanidi 2014). However, as noted by Koontz and Thomas (2006), the complexities of these questions denote co-operation amongst many different societal agencies. Academic research is more suitable for examining the outputs and outcomes to assist practitioners in designing appropriate evaluation practices.

This study, therefore, sets out to examine how the collaborative endeavours of NPOs and business in the arts context can create value for society and in doing so induce societal betterment. Building on the notions of synergistic value creation (Kurucz, Colbert and

Wheeler 2008; Austin and Seitanidi 2014) and value creation in cross-sector interactions (Austin 2000; Selsky and Parker 2005; 2011; Googins et al. 2007; Kolk et al. 2010; Le Ber and Branzei 2010a, b; Seitanidi 2010; Ryan and Fahy 2012; Austin and Seitanidi 2014) helps to achieve the stated aims.

The underpinning assumption of the thesis aligns with Austin (2000) that NPO-business relationships display distinct characteristics as they evolve. It further accords with Austin and Seitanidi (2014) that the distinct stages impact on the type of outcomes the interactions produce. The most advanced stages of collaboration continuum (Austin 2000) are reported as the form of interaction that delivers the greatest magnitude of value for society (Googins et al. 2007; Austin and Seitanidi 2014). However, in the arts context, the sophisticated approaches are at present implied more theoretically than practiced (McNicholas 2004; Kim 2009; Knight 2010; Weinstein 2010) which has fuelled debates that academic theorising increasingly fails to reflect praxis by developing models of purely academic stature (Greenwood and Levin 2000). Although this issue is beyond the scope of the thesis, this study acknowledges the need to develop theory from practice (Ellson 2004). Accordingly, the thesis builds on the findings of the scoping study for the thesis (Knight 2010) which found that transactional collaboration in arts and business interactions prevail. Prior work in the field both generally (Waddock 1988; Googins et al. 2007) and in the arts context (Moir and Taffler 2004; McNicholas 2004; Kim 2009) report similar findings.

Despite the question raised in extant research over the social function of transactional collaboration, this study further builds on Austin's (2000) original suggestion that some relationships display 'hybrid' properties that entail characteristics from across the continuum which includes alignment based on social issues eradication. This indicates that the strict demarcation of the greatest value magnitude to the most progressed relationships may have overlooked the micro processes and influencing factor of creating value under the hybrid conditions. This is particularly pertinent in light of the scoping study findings that arts and business relationships often take on the hybrid form (Knight 2010), akin to socio-sponsorship (Seitanidi and Ryan 2007). How the hybrids and transactional stages overall contribute to societal betterment is largely unknown, with a particular lacuna of its functioning in the arts context.

In addition, much of the current understanding of value creation in NPO-business interactions is derived from examining a single dyadic relationship (c.f. Austin and Seitanidi

2014). This is particularly the case for studies that report on organisational benefits by examining the relational aspects in arts and business interactions (O'Hagan and Harvey 2000; Roppo and Sauer 2003; Moir and Taffler 2004; Weinstein 2010; Preece 2010). However, these studies tend to overlook the role of wider context, both internal and external, and the key individuals advocated by processual approach to research as critical factors that shape social processes (Stake 1995; Pettigrew 1997). In terms of the internal context of collaboration management, most organisations, both nonprofit and for profit, manage a portfolio of relationships (Austin 2000; Cornwell 2008). Kim (2009: 239) notes that the future of the interaction does not rest on "the decisive case of either the progression of, or a growing repertoire of relationships *within* a single nonprofit arts-business relationship over time". Organisations typically manage a portfolio of relationship (Kim 2009) and it is, therefore, difficult to pin potential societal effect strictly to one particular relationship. The progress towards network mode of operations and portfolio management in sponsorship literature (Cornwell 2008; Chien, Cornwell and Pappu 2011; Ryan and Fahy 2012) indicates the need to move beyond theory building from a single dyadic relationship. In accord with Kim's (2009) recommendations, the future of successful arts and business interactions rests on developing and managing a portfolio of relationships. Whether and how a portfolio of relationships influences value creation requires examination and the thesis addresses the gap in literature surrounding this subject.

The above assumptions largely address the organisation-centric standpoint (Selsky and Parker 2005; Austin and Seitanidi 2014). However, scholars increasingly raise the need to understand how individuals within the organisations figure in the processes of creating value (Austin 2000; Hemingway and MacLagan 2004; Bhattacharya, Korschun and Sen 2009; Mintzberg 2009; Le Ber and Branzei 2010; Daellenbach et al. 2013). As argued by Vargo, Maglio and Akaka (2008) although value is created through co-operation of diverse stakeholders, it is always the individual beneficiary who determines its worth. Although the role of beneficiaries in creating value may fluctuate depending on context, their input in value creation process is recognised in wider management literature (Lepak, Smith and Taylor 2007). Le Ber and Branzei (2010a) raise this issue as specifically pertinent NPO-business collaboration studies since the aim is to benefit targeted individuals, whether the collaboration pursues organisational benefits through employee engagement or wider social

good. The arts context adopted in the thesis specifically calls for an incorporation of individual perspective due to the reported relational process of creating artistic value.

Moreover, pursuing shared value in NPO-business collaboration (Porter and Kramer 2011) is often theorised to relate to individual level influence for nonprofit (Austin 2000; Roppo and Sauer 2003; Şişmanyazici-Navaie 2004; Waddock 2008; Ryan and Blois 2010) and for profit organisations (Drumwright 1996; LeClair and Gordon 2000; O'Hagan and Harvey 2000; Ryan and Fahy 2003; Frank and Geppert 2004; Hemingway and Maclagan 2004; Brammer and Millington 2005; Hemingway 2005; Berger et al. 2006; Knight 2010; Daellenbach et al. 2013).

In addition, literature suggests that individual target beneficiaries exert significant influence on how and whether societal value will be generated. Any outcomes that can be considered as beneficial for society are contingent on the individual target beneficiaries' perceptions of wellbeing (Austin, Gutierrez, Ogliastri and Reficco 2006; Bhattacharya, Korschun and Sen 2009; Le Ber and Branzei 2010). However, neither the individual-level influence on the organisational level (Daellenbach et al. 2013) nor the individual target beneficiary influence (Le Ber and Branzei 2010) are well understood as the majority of studies lack the incorporation of beneficiary standpoint when researching value creation in NPO-business collaboration (Le Ber and Branzei 2010). The examination here is, therefore, anchored to integrate the beneficiary perspective with the organisational level standpoint. This can complement the current understanding of collaborative value creation (Austin and Seitanidi 2014).

Finally, the distinct value offerings between professional (high arts) and community arts are both likely to influence the type of interactions with business partners and moderate the overall impact of the specific relationships on society. Engagement with high arts is typically linked to a priori intellectual aptitude, denoting elitism (c.f. Carey 2005). Community arts typically entail the instrumental notion of "what art is able to do" alongside the intrinsic aesthetic capacity (Şişmanyazici-Navaie 2004: 179). It emphasises development related not only to human aptitude but also to community development. This agenda facilitates cultural, social and economic interaction between people. It expands social networks and strengthens the norms of reciprocity and the related issues of trust (Throsby 2003); the key features of social capital as defined by Putman (2000). It essentially incorporates both economic and social value frames through human and social capital

development (Throsby 2003; Şişmanyazici-Navaie 2004) and offers significant potential for societal betterment. However, whether and how this occurs in practice is not well known as the majority of collaboration studies fail to make an appropriate distinction between the different types of arts organisations. Incorporating this distinction may shed light on the ongoing debate as to whether and under what conditions corporate arts support is motivated primarily by commercial objectives (e.g. O'Hagan and Harvey 2000; Moir and Taffler 2004; Knight 2010) and/or by a shared value vision (Porter and Kramer 2011) as reported in conceptual propositions (e.g. McNicholas 2004; Kim 2009) and anecdotal evidence (Şişmanyazici-Navaie 2004; A&B 2013).

In attempting to contribute to theory building by addressing the points raised above, the thesis develops a conceptual framework by using empirical data collected via observations, interviews and documentary analysis of a case study by individuals from a nonprofit community arts organisation that manages a dynamic portfolio of relationships with diverse partners. This is then further corroborated using data obtained from in-depth interviews with diverse stakeholders of nonprofit arts organisations that pursue some form of community development and business that are either directly or indirectly linked through a network of relationships.

Based on the stated research problem, the aim of the thesis is to examine how community arts organisations and businesses engaged in transactional collaboration create value for society, as a way of answering the overarching question: "How do arts and business organisations create value for society through collaboration?" To guide the construction of the conceptual framework, the research agenda consists of the following broad objectives. The broad aim is to:

- define the relational/contextual dynamics through which societal betterment is given expression/is untapped by transactional collaboration in the arts context

This is further broken down to a set of more specific objectives:

- to provide a detailed account of the approaches to transactional collaboration through which societal betterment emerges in the arts context

- to provide a detailed account of the interaction processes through which value for society is generated in transactional collaboration in the arts context, through the lens of a combined organisational and beneficiary-centric standpoints
- to provide a detailed account of how societal betterment emerges through managing a portfolio of transactional relationships by an arts organisation
- to articulate the nuances of value that benefit society as generated through transactional collaboration between arts and business organisations.
- to convey the meaning of collaborative value for society as perceived by the different stakeholders of hybrid transactional relationships between arts organisations and business organisations

The study responds to calls within literature for conceptual development to be grounded in “empirical realities” (Gond and Crane 2010: 694; Seitanidi 2010). Also acknowledged are scholars who advocate searching for novel ways of creating value by seeking and relating common interests from a wide range of diverse stakeholders concurrently (Kurucz et al. 2008; Kourula and Halme 2008; Porter and Kramer 2011; Austin 2010; Seitanidi and Lindgreen 2010; Austin and Seitanidi 2014), as well as demonstrating how different types of NPO-business relationships generate outcomes for society in different contexts (Halme and Laurila 2009; Austin and Seitanidi 2012b).

Having set out the aims and objectives of the study, the next section will define the key terms and concepts used in this study.

1.4 Defining key terms

Arts and business interactions and social alliances are not new subjects, yet a wide range of terms and concepts have been used in the above discussion, many of which may be perceived as open to interpretation. Before proceeding, delimiting the boundaries and defining the key concepts and terminology used throughout the thesis will provide a useful

lexicon that clarifies the ideas presented and helps to prevent potential misunderstandings. The following subsections define what the term ‘the arts’ entails in the thesis and what is understood as an arts organisation in terms of sector affiliations and the functional element of producing artistic value (1.4.1), followed by explaining how the term business will be approached (1.4.2). The last subsection provides the definitional basis of arts and business collaboration (1.4.3) as employed in this study.

1.4.1 Arts

McCarthy, Brooks, Lowell and Zakaras (2001) state that “the literature on the arts world suffers from several weaknesses” making researching the arts complex and any classification tenuous. DiMaggio (1987) and McCarthy et al. (2001) suggest that when attempting to analyse the arts, it is crucial to consider three differentiating dimensions: the artform itself, as the mode of production and the type of organisation involved are distinct across artforms; the sector of the economy in which it is produced; and “the key players in the process of creating the art” (ibid 2001: 6). The following subsections evaluate the performing arts as the artform, the nonprofit sector as the context and community arts as the functional component.

1.4.1.1 *Artform*

Studies that examine cultural economics report that different artforms vary in their contributions to developing cultural capital (c.f. Towse 2003). Throsby (2003) distinguishes between artforms as contributors to cultural capital based on whether the value they generate is tangible or intangible. Tangible value comprises the artefacts and artworks of the visual arts or fine arts. Intangible cultural capital entails “artworks which exist in their pure form... such as music” (ibid 2003: 168). Performing arts constitute the pure artform as the value is inherent in the performance itself (Sicca 2000; Arlander 2011). As well as music, performing arts include theatre, opera, dance, live arts performed in all venues and non-live arts through all forms of mass media (McCarthy et al. 2001). In terms of the mode of production, performing arts denote a collective activity between the audience and the

artists. It requires the participants to articulate and co-ordinate amongst themselves (Sicca 2000; Kern 2006), positing the performing arts as particularly useful in human aptitude and skills development (Darso 2004). These developmental properties of the performing arts are particularly apposite for considering the arts not only for its intrinsic aesthetic qualities but also as a developmental tool that contributes to enhancing social welfare (Şişmanyazici-Navaie 2004).

According to arts administration literature, the popularity of performing arts in society has grown exponentially in recent decades, both at an audience and participatory level (McCarthy et al. 2001; ACE 2011) and this popularity is reflected in arts and business relationships. Kim (2009) finds that the performing arts organisations are by far the most preferred arts partner for the private sector when engaging with the arts. The thesis aims to study how arts and business organisations create value together that can contribute to societal betterment by examining the complex contextual arrangements that surround the processes of societal value creation. Thus, the reported preference for performing arts-based relationships by businesses and the developmental quality imbued in the performing arts make this genre a highly productive research background. The terms arts in the thesis, therefore, relate to the performing arts as the artform.

1.4.1.2 Sectoral status

This section considers the difference between commercial interest versus cultural capital development in arts organisations orientation as a determinant of the value produced for society. DiMaggio (1987) suggests industry-specific principles of classification on the arts administration level that separates commercialism from cultural capital development. Commercial organisations pay taxes and rely on profitability to sustain operations. They form part of the private sector as the primary focus is personal interest as opposed to contributions to cultural/social capital. NPOs in the arts are mission driven, demarcating their economic sector as the nonprofit sector. This classification is consistent with the United Nations (UN) definition of NPOs: “any non-profit, voluntary citizens’ group, which is organised on a local, national and international level [that is] task oriented and driven by people with a common interest” (UN, cited in Yaziji and Doh 2009: 4). However,

simply defining arts organisations that are mission driven as NPOs would promulgate the traditional sectoral dichotomy between NPOs and business. This would essentially fail to reflect the shifts in increased adoption of market orientation in some aspects of arts administration in recent decades.

The shift towards privatisation and extensive budget cuts to organisations delivering social provision during the 1980s (Austin, Gutierrez, Ogliastri and Reficco 2007) prompted the emergence of the social enterprise as a novel form of organisational set up (Di Domenico, Tracey and Haugh 2009). Social enterprise status enables nonprofit organisations to blend their social mission with economic value generation by engaging in commercial activity aimed at producing profit. Social enterprises span the sectoral boundaries making the traditional distinctions based on the economic and social value dichotomies tenuous. The legal status traditionally used to differentiate between sectors (c.f. Seitanidi and Ryan 2007) is no longer a definitive indicator. The UK Civil Society Almanac (NCVO 2014) found that small community organisations lack the knowledge, time and resources to set up as registered charities and instead opt to operate under the auspices of a commercial legal status. This has led to much confusion and cynicism about the positioning of social enterprises within the nonprofit sector. Di Domenico et al. (2009: 893), however, contend that social enterprise forms part of the nonprofit sector and summarise its structure as follows:

“... a nonprofit venture which aims to achieve a given social purpose through strategies which generate income from commercial activity... [they] differ from private enterprises in terms of their social goals, ownership structures, governance and accountability, and from [NPOs] in their pursuit of commercial activity rather than reliance on grants, donations or membership...”

Nowadays, many arts organisations combine the features of the nonprofit and for profit sectors to overcome the changing environment of arts funding (Austin, Stevenson et al. 2006; Di Domenico, Haugh and Tracey 2010). As noted by arts administration scholars (e.g. McCarthy et al. 2001; Rentschler et al. 2002; Colbert 2003a, b; Roppo and Sauer 2003; McNicholas 2004; Kim 2009; Preece 2010), market orientation with the focus on more efficient and effective operations have been adopted by nonprofit arts organisations to

attain fiscal stability (c.f. Kotler and Scheff 1997; Colbert 2003b; Roppo and Sauer 2003; Bussell and Forbes 2006; Kim 2009) and mainstream marketing tactics such as relationships marketing has been integrated into arts administration to improve organisational sustainability (Rentschler et al. 2002; Conway and Whitlock 2004). For example, McCarthy et al. (2001) and Kim (2009) report that nonprofit arts entities that utilise profit making subsidiaries to support their operations are increasingly common.

The thesis will focus on the social mission driven arts organisations that operate with the help of different streams of funding as specific types of NPOs. Their mission centres on creating public benefit; no profit flows to designated shareholders, regardless of the legal status. However, the magnitude and multitude of social value created by nonprofit arts organisations further varies depending on the previously identified functional element that indicates whether the arts are used for their intrinsic quality or their instrumentality (McCarthy et al. 2001; Arlander 2011). This distinction represents another dimension that will be discussed in the following section.

1.4.1.3 Functional elements of arts organisations

The commercial and nonprofit sector classification of arts organisations discussed above helps to differentiate between the relative degree of private and public benefit as it relates to profit versus social value primacy. McCarthy et al. (2001) suggest that the magnitude and multitude of public benefit is also contingent on the functional aspect of how the arts are created. In large professional nonprofit organisations, artistic value stems from a professional piece of art consumed by audience (Şişmanyazıcı-Navaie 2004; Moir 2004; Stanziola 2007). Nonprofit community arts organisations typically incorporate small scale professional, amateur, avocational, low budget and grassroots professional activities that cater to local communities and provide hands-on access to lay participants. Social capital development occurs both in terms of contributing to cultural capital enhancement, and individual and community development (McCarthy et al. 2001). The nonprofit community arts offer a rich milieu for this study which aims to investigate the implications of arts and business collaboration for societal betterment. In addition, existing arts and business interactions studies indicate that the objectives pursued in relationships of high

arts or large prestigious arts organisations differ from those of community arts organisations (Moir 2004; Frank and Geppert 2004). In the community arts context, the benefits are likely to be more intangible, associated with improving welfare within local communities catering to corporate social responsibility (CSR) objectives as opposed to marketing related pursuits (McCarthy et al. 2001; Moir 2004; Frank and Geppert 2004). The functional element of an arts organisation is, therefore, demarcated to nonprofit community arts organisations.

In summary, the thesis examines a range of arts organisations in terms of the specific art disciplines pursued, the size and the degree to which professional performances form part of the value offering. However, all the organisations incorporate the performing arts as a specific genre, operate within the nonprofit sector and fall into the category of small to mid-sized organisations as categorised by McCarthy et al. (2001) and Kim (2009), respectively. They also unite in pursuing an explicit social mission related to the development of the local community they serve. Having defined the arts aspect of the thesis, the subsections discuss how the term business will be approached on the back of the CSR, NPO and social enterprise concepts.

1.4.2 Business

The term business typically denotes any organised commercial activity that generates economic value in society. It is enacted by individuals or groups of individuals formed around entities ranging from a sole trader to multinational corporations operating in the private sector. The aim is on maximising profit for the benefit of the organisations' shareholders (Friedman 1970). Although in the last few decades the narrow focus on shareholders has begun to shift to incorporate the views of other stakeholders (Freeman 1984), much debate exists as to whether business can or indeed should serve a dual objective function (Jensen 2002; Margolis and Walsh 2003; Crane, Palazzo, Spence and Matten 2014; Porter and Kramer 2014). Whether shareholders denote the only constituent or constitute a typically central group of stakeholders, the aim of business in the traditional sense is to channel the surpluses of revenue over expenditure to the company's shareholders. The primary role is to generate economic value.

The recent shift towards pursuing shared value relates to the much debated role of business in society and how it is enacted (Porter and Kramer 2011). The traditional economic paradigm is underpinned by the theory of shareholder maximisation as a legal norm for business (Margolis and Walsh 2003). The enhancement of economic market value is the only role of business in society. Citizenship demands are fulfilled through wealth and employment creation and paying taxes. The only responsibility business has in society, as stated by Friedman (1970: 122) is “to use its resources and engage in activities designed to increase its profits... while conforming to the basic rules of society, both those embodied in the law and those embodied in ethical custom”. Any activity that reduces or avoids distributing the profits according to the contractarian shareholder obligations is in breach of the legal and ethical norms.

However, as suggested by Crowther and Capaldi (2008) the contractarian tradition in corporations has witnessed an increasing separation between ownership and management. The lack of personal accountability of executives has served as a legitimate excuse for selfish corporate behaviour that disregards the implied legal and ethical rules of profit seeking (Mintzberg, Simons and Basu 2002). Although the practice once generated unprecedented profitability, ‘business as usual’ came under intense scrutiny following various media exposes in the 1990s which levied significant reputational damage on perceived unethical corporations (c.f. Spar and La Mure 2003). Society began to demand the return to the original charter of business as “social institutions that must justify their existence by their overall contribution to society... [and] serve a balanced set of stakeholders” (Mintzberg et al. 2002: 69). These developments led to a growing attention on the concept of corporate social responsibility (CSR) in “business, civil society and government across the globe” (Crane, McWilliams, Matten, Moon and Siegel 2008: 4).

CSR embodies the notion of business operating in a socially responsible manner where the emergence of CSR policies, programmes and reports represents a structured institutional response to demonstrating responsible operations (Crane et al. 2008). Although the contested core tenets of CSR continue to impede a precise definition, Crane et al. (2008: 6) state that CSR centres on “the subject of social obligations and impacts of corporations on society”. Crowther (2008) suggests that CSR further defines the interactions between companies, governments and individual citizens, and more specifically the relationships

between companies and their respective stakeholders. The European Commission (CEC 2001) clarifies that CSR is a voluntary concept.

Despite the 'soft regulation' and continuing debates over whether, for what and how corporations are responsible in society, CSR poses important strategic implications for business. This is particularly the case in the UK where, according to Moon (2004), the government's emphasis on shared responsibility over governance deficits contributed towards the institutionalisation of CSR. Businesses in the UK engage in socially responsible activities that include socially responsible investment practices, reporting on social and environmental practices and engagement in community related activities. The institutionalisation of CSR encouraged businesses to shift the emphasis in community engagement from simple donations to increasingly sophisticated collaborations across sector to identify innovative solutions to social problems in wider society (Seitanidi 2010). Businesses now partake in producing social value alongside their economic value function. As discussed in the 'sectoral status' section, the dual value generating function makes defining what constitutes business tenuous. Nonetheless, in this case, the profit focus, albeit enlightened, differentiates the commercial business of the private sector from organisations that incorporate economic value generation as part of self-sustaining management in the nonprofit sector (Austin, Leonard, Reficco and Wei-Skillern 2006).

Accordingly, the term business in this study is employed to refer to organisations that seek profit and generate economic value as their primary objective.

1.4.2.1 Business delimitations

CSR in the UK has been institutionalised, yet its voluntary nature allows business to decide the degree to which it will incorporate these varied activities. Extant studies report that the extent of integration varies with factors that include company size (e.g. Jenkins 2006) and industrial sector (e.g. O'Hagan and Harvey 2000; Kim 2009). Small and medium size enterprises (SMEs) have been found to share the notion of social and environmental responsibility, although as argued by Jenkins (2006: 243), "the motivational pressures that may engage SMEs in CSR are not the same as for large companies". She further reports that SMEs typically only utilise ad hoc philanthropy or voluntary contributions to local communities with limited official records kept as part of their community engagement.

Developing an understanding of how specific arts and business interactions contribute positively to society, however, requires having access to information rich sources to allow in-depth examination. Useem (1988) reports that large businesses have more organised and formal corporate support programmes. Likewise, Kim (2009) finds that large US businesses with a turnover of over \$50m account for 80% of corporate arts support and attributes this to the greater levels of resources required to manage the relationships. The study, therefore, focuses on large corporate businesses, although it is acknowledged that SMEs appear as ad hoc contributors to the societal value created by the central arts organisation in the case study. The differences in motivation between large businesses and SMEs and the nuances associated with the management of community engagement in SMEs (Jenkins 2006), however, makes an appropriate integration of this segment beyond the scope of the thesis. This limitation is offered as a future research avenue at the end of the thesis.

Beside the size factors, Useem (1988) suggests that industry sector differences in engaging with the arts are mediated by the degree of public contact in business operations. O'Hagan and Harvey (2000) find that consumer-focused businesses account for most relationships between arts and business. Kim (2009) similarly reports that with arts partnerships, the service industrial sector takes the lead at 60% as opposed to 40% for manufacturing. In the service sector, finance/insurance and banks categories account for more than half (32%). Interestingly, when considering only transactional relationships (arts sponsorship, joint-issue promotion, and cause related marketing), the difference between service and manufacturing sectors reduces significantly to just 2%.

The thesis inadvertently reflects this relative distribution in that the majority of businesses in the study represent the service sector, particularly the finance/insurance and banks categories. These companies were named by the arts organisations that participated in the corroborative interviews as their most important business partners and formed part of the network of relationships in the case study. In the case study however, the relationships extend to the manufacturing sector, albeit within the creative industry remit. Business in the thesis hence refers to large, for profit entities set up primarily to generate economic value in society. Industry covers both service and manufacturing sectors, where the categories of industry include the financial and creative industries.

So far, the definitions approach the nonprofit and business sectors through a separate lens. Both strongly point to increasingly close working relationships between the sectors and to inter-borrowing of competencies and operational approaches (Selsky and Parker 2005). Whilst there is a growing consensus for the collaborative convergence between the sectors, the varying degree to which both nonprofit and business organisations incorporate the collaborative notion has resulted in considerable confusion over the definition and interchangeable use of different relationship forms such as philanthropy, sponsorship and alliance, etc. in both theory and practice. Since these terms are not synonymous, clarifying each form and how it will be adopted will avoid potential confusion in proceeding with this research. The ensuing section outlines how and why the thesis will utilise the term arts and business collaboration.

1.4.3 Arts and business interactions terminology

Table 1: Summary of definitional underpinning of arts and business interactions terminology

	Philanthropy	Sponsorship	Alliance	Collaboration	Partnership
<i>motive/objective</i>	Altruism/social value	Private gain/organisational objectives	Complementarity/supplementation	Altruism to enlightened self-interest to societal value (depending on stage on CC)	Societal value
<i>scope</i>	unfocused	specific cause/organisation	Specific project	Focused/wide-ranging	specific project
<i>constitution</i>	informal	contractual/formal agreement	contractual	Informal to formalised agreement	contractual/formal agreement
<i>mind-set</i>	autonomous	Autonomous	Autonomous to mutual (depending on types of alliance)	Autonomous to mutual (depending on stage on CC)	mutual
<i>Time-frame</i>	Short term/ad hoc	Short term – one off to long term – ongoing (depending on exchange or relational orientation)	Short term to long term (depending on type of alliance)	Short term – ad hoc to open ended (depending on stage on CC)	Open ended

Until relatively recently the dominant idea within literature was that arts and business interactions denote philanthropy. However, the original sense of corporate philanthropy as “mak[ing] gifts to a nonprofit organisation without *any* expectation of commercial reward” (Bennett and Sargeant 2005, p. 798) has changed with the increasingly strategic approach both business and nonprofit arts organisations employ in their interactions (McNicholas 2004; Moir and Taffler 2004; Kim 2009; Weinstein 2010). Despite the persisting use of philanthropy (e.g. Moir and Taffler 2004), terms most associated with arts and business interactions nowadays include alliance, collaboration, sponsorship and partnerships. Although these terms are often used interchangeably to refer to activities that cover donation, sponsorship or joint ventures both in practice and in scholarly work, there are differences in their definitional underpinnings that need to be drawn before proceeding with this study.

Iyer (2003) defines alliances as “a working partnership in which there is mutual recognition and understanding that the success of each firm depends in part on the other firm/firms [where] the scope of alliances includes businesses, nonprofits and government [and] it is conceivable to have multi-firm alliances” (Iyer 2003: 43). Although this definition corresponds with the notion of added value by working in collaboration, it rests on the idea that alliance is a working ‘partnership’. The term partnership is at odds with other work on cross-sector interactions (Waddock 1988; Seitanidi and Ryan 2007; Glasbergen 2007; Kolk, van Tulder and Kostwinder 2008; Seitanidi 2010). Waddock (1988: 18) defines social partnership as a distinct form of collaboration that entails a commitment to co-operation between cross-sector organisation/s by pooling resources to eliminate social issues that “lie within the traditional realm of public policy” and affect all partners. Social partnerships are seen as a distinct relationship type in terms of power symmetries and social legitimacy (Seitanidi and Ryan 2007), and in motivational orientation where the specific social outcome forms the very impetus behind the relationship (Seitanidi 2010). In contrast, sponsorship denotes a “process-dependent relationship of exchange... contributing to a range of broader organizational objectives for both sponsor and the sponsored organization” (Daellenbach, Davies and Ashill 2006: 71). In the thesis, partnership will refer to a highly advanced form of NPO-business arrangements – integrative/transformational – and sponsorship falls in the transactional stages.

The distinction between alliance and collaboration appears more ambiguous. Austin (2000) uses them interchangeably in the seminal NPO-business interactions work. Glasbergen's (2007) definition of partnerships helps to shed light on the differences. In defining partnerships as a potentially more powerful driver of societal betterment than other arrangements, Glasbergen makes a clear distinction between the terms partnership, alliance and collaboration: "Partnerships are self-organising and coordinating alliances, or – in a more strict definition – collaborative arrangements..." (ibid 2007: 2). The difference between alliance and collaboration can then be linked to the self-organising and co-ordinating principles. Collaborative arrangements are formalised only to "some extent" (ibid 2007: 2). This distinction essentially heeds the work of Malone, Laubacher, and Scott Morton (2003) that provides some basic definitional guidelines. Alliance signifies a contractual agreement with various stakeholders. In instances where no formal contract is involved, the term collaboration applies, essentially referring to a distinct form of alliance based on less formal arrangements (Malone et al. 2003).

In arts and business interactions, no specific taxonomy of the terminology exists. The terms tend to be used interchangeably by both practitioners and scholars. Kim (2009) is the only study that distinguishes between alliance, partnership and collaboration in the arts context. Collaboration is a relationship that can range from ad hoc to open ended and informal to more formalised activity. It is distinct by progressive and integrated decision making, mutual benefits and a shared goal. Alliance is termed as a strategic alliance by Kim (2009) and represents a specific, long term, contractually agreed project based on complementarity. These are used specifically in 'business-to-business like' dealings.

However, Kim (2009) approaches partnerships as an umbrella concept that incorporates both transactional stage (licensing, sponsorship, cause-related marketing) and the integrative stage of Austin's (2000) continuum. This is at odds with the definition of partnership outlined above. In order to align with the developments in the wider NPO-business collaboration theories, partnership in this study characterises a specific relational engagement beyond the transactional stages (Seitanidi and Ryan 2007).

In summary, the thesis adopts the term collaboration as it is the most flexible, broad encompassing idiom that reflects the evolution and co-existence of different forms of relationships. As specifically related to the findings and contributions of the thesis, arts and business collaboration refers to relationships between arts and business as defined in the

proceeding sections. Table 1 provides an overview of the terminology. With the key terminology defined and boundaries of how the different terms are utilised, the next section will provide an outline to the map of the thesis.

1.5 Map of the thesis

With the research problems set out and key terminology defined, the final section of this chapter will provide a map of the thesis and of the content of the subsequent chapters. The thesis consists of seven parts and nine chapters which are shown in figure 1 and explained below.

In chapter 2, the collaborative convergence between NPOs and business is examined through the respective move towards collaboration in nonprofit and private sectors. The various interactional structures that have developed around the collaboration phenomena are reviewed. In light of the review, it is argued that the ability of the different types of transactional relationships to contribute to societal betterment is under-researched.

Chapter 3 examines the specifics related to value creation in NPO-business collaboration, with a specific focus on transactional collaboration. Value creation is evaluated in light of the structural and governance characteristics of relationships. The review argues that individual-centric standpoint, particularly that related to target beneficiaries, needs to be integrated into the prevalent organisation-centric perspective in literature to gain a holistic view of the value that transactional collaboration bestows for society. Levels of value creation are examined to help explain the causal links through which the individual benefits transfer across to other levels to stimulate societal value creation. The underdeveloped macro level is discussed and knowledge gaps in terms of processual outcomes perspective, collaboration portfolios and contextual perspective are set out as impeding contributions from transactional collaboration in order to extend the macro level understanding.

Chapter 4 contextualises the thesis in the arts setting. Current developments in the UK's arts sector are reviewed, followed by a discussion of the trends in arts and business collaboration. The review then presents the current understanding of societal value creation

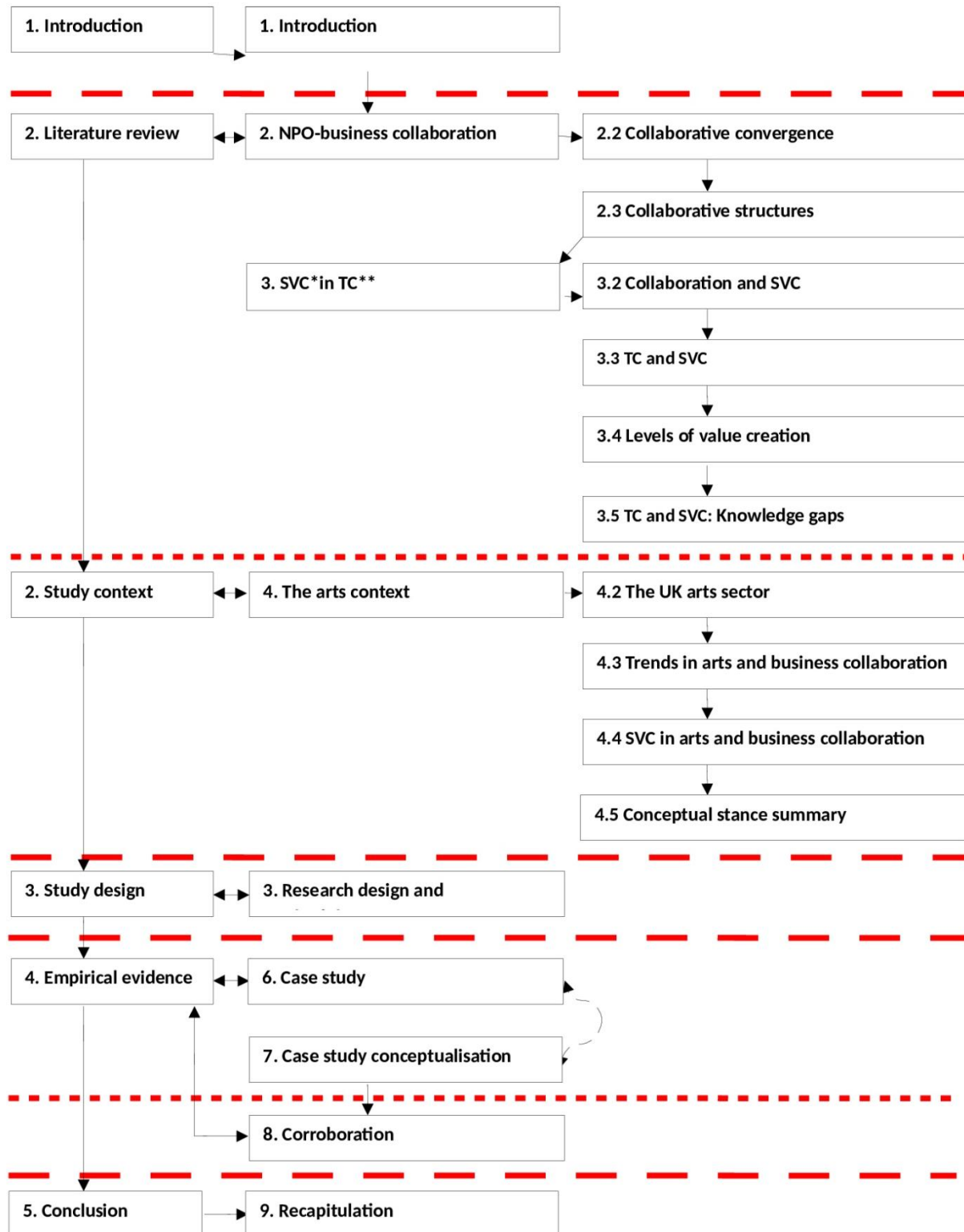
in transactional arts and business collaboration studies. The close of chapter 4 summarises the conceptual stance and restates the study aim.

In chapter 5, the research design is outlined, which includes the ontological and epistemological underpinning. An overview of the constructivist interpretive paradigm and the related qualitative methodology based on a multi method data collection approach is presented. Also outlined are the issues related to research quality and ethical standards.

Chapter 6 opens the part of the thesis where the study results are reported and narrates the central case study. Chapters 7 and 8 conceptualise and corroborate the case study and literature, by initially considering the implications of the case study for societal value creation through transactional collaboration in the arts in light of the literature previewed in chapters 2, 3, and 4. Chapter 8 then considers the initial framework in light of further data collected through in-depth interviews. The aim is to elucidate the complexities involved in the emergence of benefits at the different levels of analysis, as reported by those directly influenced by the manifestation of the benefits. The findings of the study are reported in the form of a set of propositions grouped under three main themes that include principles and manifestations of societal value creation, and functions of the business partner in societal value creation.

Chapter 9 closes the study by offering a recapitulation of the research problem and how it was addressed. It provides a concluding discussion of the main findings as will be presented in section 8.3. Key academic contributions, together with managerial and policy implications are outlined. This chapter and the thesis close with reference to any limitations of this study and future research recommendations, before a final thought reflecting on the process of conducting doctoral research.

Figure 1: Map of thesis



CHAPTER 2: NPO-BUSINESS COLLABORATION

“... The twenty-first century will be the age of alliances. In this age, collaboration between nonprofit organisations and corporations will grow in frequency and strategic importance. Collaborative relationships will increasingly migrate from the traditionally philanthropic, characterised by benevolent donor and grateful recipient, toward deeper, strategic alliances. These changes are already under way, and the changing alliance landscape is rich in variety, with businesses and nonprofits finding new ways to work together to achieve their goals and contribute to society...”

(Austin 2000: 1)

2.1 Introduction

The focus of the literature review presented in this part of the thesis (chapters 2, 3, 4) is on literature related to the issues identified in the research problem. The review will demonstrate familiarity with prior work undertaken in the field and will set the foundation for the theory building aims of the thesis. The thesis broadly studies cross-sector collaboration and its links with societal betterment. Zadek (2008) proclaims that we have entered an era where collaboration across societal sectors offers a unique source of hope for achieving a sustainable society. Selsky and Parker (2005) note that social challenges nowadays are highly complex and touch every aspect of society ranging from environment to health and education, etc. Their complexity requires innovative solutions beyond the scope of the established sectoral ways.

Collaboration offers the opportunity to learn and borrow between sectors and through co-operation address growing societal challenges. Collaboration occurs in many forms across the three dominant societal sectors that include NPOs and business; public-private partnerships between government and business; governments and NPOs, and relationships where all three sectors work together, known as trisector collaboration (Selsky and Parker 2005). The specific focus of the thesis is on NPO-business collaboration that is now perceived as “an inescapable and powerful vehicle for... achieving social and economic missions” (Austin and Seitanidi 2012a:728).

This chapter discusses NPO-business collaboration and reviews NPO-business collaboration literature as part of the collaborative convergence between the nonprofit and for profit sectors in recent decades. The review outlines the role of developments in the nonprofit sector that altered the traditionally antagonistic view towards the private sector and the intensifying relationships between the sectors. This is followed by discussing the gradual incorporation of social responsibility in business strategy as encompassed in the CSR concept. Existing conceptualisation of the varied interactions (Austin 2000; Wymer and Samu 2003; Seitanidi and Ryan 2007; Seitanidi 2010; Austin and Seitanidi 2014) are then evaluated and the gap in understanding about how societal value can be created through different approaches to transactional collaboration is presented. The next section looks at the environmental conditions that led to the increased interactions between NPOs and business.

2.2 Collaborative convergence

The environmental conditions that have prompted a move towards collaborative convergence between the nonprofit and the private sectors suggest consideration of the ability of NPOs and businesses to successfully collaborate requires a degree of intersection in values, interests and shared benefits (Waddock 1988; Austin 2000; Berger et al. 2004; Selsky and Parker 2005, 2011; Porter and Kramer 2011; Le Ber and Branzei 2010b; Austin and Seitanidi 2014). However, tensions linked to the relative powers of each sector (Waddock 1988; Seitanidi and Ryan 2007; Seitanidi 2010; Le Ber and Branzei 2010) and the inherent sectoral identities (Austin 2000; Yaziji 2002, 2004; Selsky and Parker 2005, 2011; Le Ber and Branzei 2010b; Seitanidi 2010) impede full integration. The inhibitors reportedly relate to misunderstandings, misallocation of costs and benefits, mismatches of power, mismatched partners, misfortunes of time, and mistrust (Berger et al. 2004). These inhibitors arise from the lack of an appropriate fit between the partners, particularly in the more basic relationships (Austin 2000; Gourville and Rangan 2004).

The difficulty to establish partner alignment occurs due to the different value frames prevalent in each sector. Berger et al. (2004: 61) suggest that the schism is “rooted in cultural differences between the sectors” where the private sector is traditionally economic

gain oriented, whereas societal betterment is the domain of the nonprofit sector. These two perspectives form divergent approaches to societal welfare contributions that initially impeded the move towards co-operation between the nonprofit and for profit sectors.

In particular, the nonprofit sector tended towards scepticism regarding the collaborative motives of the for profit sector. The majority of NPOs initially objected to the collaborative notion as they viewed corporations as adversaries whose practices generate negative societal externalities (Rehbein, Waddock and Graves, 2004; Crane and Matten 2010). In turn, corporations perceived nonprofits as lacking professionalism, and as being inefficient, unrealistic and unaccountable (Farrelly and Quester 2005; Lakin and Scheubel 2010), missing the strategic perspectives typified by the intra-sector strategic alliances. Businesses, therefore, tended to approach community relations via an arm's length, cheque writing approach to charitable donation (Martorella 1996b; Young and Burlingame 1996).

The reported urgency of social issues in today's society that impacts all societal actors (Porter and Kramer 2011) has arguably started to shift opinions within both sectors. Although not all organisations look beyond the sectoral discord, the emergent notion of complementing each other's unique resources to overcome pervasive social problems is taking a stronghold in society (Austin 2000; Selsky and Parker 2005). Seitani and Ryan (2007) suggest that the heterogeneity between nonprofit and for profit sectors can be utilised for societal advantage. Through active interaction and complementing of the distinct competencies, unique sources of innovation may emerge and contribute to sustainable societal betterment. The following sections will discuss in further detail how the collaborative mindset developed firstly within the nonprofit sector, followed by a preview of the influencing factors that prompted business to integrate relationships with NPOs in the business strategy.

2.2.1 Collaborative convergence in the nonprofit sector

This subsection looks at the gradual move towards collaboration within the nonprofit sector. It examines the initial interactions, which were at times antagonistic, between the sectors. Nonprofit organisations reacted with caution towards the idea of collaboration with

business (Selsky and Parker 2005), and advocacy NPOs, opposed it outright (Rehbein et al. 2004).

However, as chapter 1 illustrates, the unprecedented pressures in wider society since the late 1980s have impinged the ability of NPOs to fulfil their missions using traditional administration approaches (Austin et al. 2006; Austin et al. 2007; Chew 2009; Di Domenico et al. 2009). Chew (2009: 63) suggests that the volatility of the UK's economy in recent years poses a "key strategic threat" to nonprofit organisations. The fall in public funding revenues, coupled with an increasing competition for these funds, are clear indicators of the need to become more strategic in the approach to funding. NPOs need to look for new sources of revenues and attract different forms of funding to bridge the lost funding streams (Chew 2009; Di Domenico et al. 2009). As admonished by Yaziji (2002: 2), "The world is getting smaller and unless [NPOs] perform – and partner – responsibly, they will not be around for long". This meant that NPOs needed to change their fiscal administration practices in order to survive.

Many NPOs have now progressed from viewing the private sector as enemies largely responsible for the creation of the increasingly complex social issues that NPOs need to address. Contemporary NPOs are multifaceted entities that often take form of a social enterprise that generates part of its own income to support the operations (Di Domenico et al. 2009) as opposed to the traditional reliance on external funding. They also understand the world of business and develop custom-made propositions through appropriate collaboration with businesses and this can create a multitude of positive socio-economic outcomes (Bendell 2000; Yaziji and Doh 2009).

As noted by Bendell (2000: 245), the trend is "toward more collaborative activities... progression of tactics, from protests to partnerships". This enables NPOs to promote and facilitate change from within the relationships rather than exerting external pressures through boycotting. The growing recognition that co-operation across sectors represents a unique source through which sustainable societal welfare can be effected is reflected in the ubiquitous notion within both sectors that collaboration has become the "modus operandi" in the new millennium (Austin 2000; Googins and Rochlin 2000; Nelson and Zadek 2000; Bendell 2000; Yaziji 2002; Selsky and Parker 2005; Austin et al. 2007; Lakin and Scheubel 2010; Austin and Seitanidi 2014).

This convergence towards collaborative relationships denotes that not only NPOs but also businesses nowadays incorporate social value into business practice. However, just as for NPOs, integrating opposing value frames into business operations that might demand redistribution of company value to alternative stakeholders introduced a range of challenges and prompted opposition. The focus on economic value generation in business demanded by the prevalent idea of shareholder capitalism (Friedman 1970) stands in direct contrast to the typically socially oriented values of NPOs that are established to improve society by eradicating exploitation and marginalisation. The following section evaluates how private sector entities began to incorporate collaborating with NPOs as part of the shifting private sector strategy.

2.2.2 Integrating social orientation into business value proposition: CSR motive

The more sophisticated interactions between the private and nonprofit sectors that have begun to surface in recent decades require that social objectives are incorporated into the traditional economic function of business (Austin 2000; Seitanidi and Ryan 2007). One of the initial forces that triggered these developments is the growing demands of society for the business world's greater participation in addressing social problems (Porter and Kramer 2011). However, more recently, the notion of win-win outcomes of integrating social objectives through CSR has contributed towards a perceived proliferation of cross-sector collaboration. The evolution of the win-win perspective and its effect on NPO-business collaboration is, therefore, discussed next. The discussion centres on the shift from shareholder primacy towards a stakeholder approach distinct by the pursuit of enlightened self-interest that can lead to win-win outcomes, the empirical stance towards the business case for CSR discussed through the CSR and financial performance link, and the different CSR modes as the mediators of a positive link. Community involvement is then outlined as a distinct activity through which advanced levels of CSR can be incorporated where collaborating with NPOs improves the legitimacy of CSR.

The move towards incorporating social objectives relates to the growing demand in society for business to share in the responsibilities for social problems. The growing complexity of social problems is indeed often attributable to the very practices of

corporations that through selfish operations produce negative externalities (Carroll 1979; Wood 1991; Mintzberg et al. 2002). The negative externalities figure as one of the key factors that stimulated the conceptualisation of the CSR concept as an institutional response to demonstrating responsible operations. However, the scope of social responsibilities of business nowadays extends beyond the negative externalities and entails an ethical and sustainable approach to all financial, environmental and social matters. It impacts both internal and external business functions and the practice has been summarised by Ioannou and Serafeim (2010: 14) as:

“a complex multidimensional array of strategies that includes policies aimed at improving the firm’s environmental footprint, its community involvement, its labor relations record, its diversity measures and a range of other issues, addressing the needs and concerns of a wide range of stakeholders”.

As discussed in chapter 1 in ‘defining the key terms’, the institutionalisation of CSR in the UK intensified the interactions between business and the nonprofit sector through greater emphasis on community engagement. Developing an increasingly sophisticated collaboration with NPOs is viewed by businesses as a highly promising approach to implementing CSR that serves a range of stakeholders and creates value beyond the organisational boundaries. CSR in this perspective denotes a motivational trigger that drives the progressively more complex incorporation of social objectives to business operations (Seitanidi and Ryan 2007). However, before moving on to examine the value creation potential of collaboration, it is necessary to examine how the CSR literature approaches value creation and collaboration with NPOs. The next subsection will consider the notion of value in CSR.

2.2.2.1 Business self-interest vs. stakeholder approach

CSR has become firmly embedded in business strategy (de Bakker et al. 2005), yet it remains a contested concept by the proponents of profitability as the primary function of business (Friedman 1970). The contentions centre on the primacy of business value against

the stakeholder value approach (see Crane et al. 2008 for general overview) and suggest that examining value in CSR requires an understanding of the key arguments. Proponents of the business value primacy typically state that pursuing a dual objective function is logically impossible and essentially results in no objective (Jensen 2002). Shareholder value maximisation here is the principle responsibility assumed by business and shareholders are the primary constituency to whom businesses cater. Considering any other stakeholders denotes unlawful redistribution of company value. However, Wood (1991) argues that the institutional and organisational principles of social responsibility of business as a societal institution suggest that business has broader responsibilities. The principle of legitimacy as a proscriptive, structural obligation guarantees successful business operations due to the interconnectedness of business and society. This is further compounded by the principle of public responsibility that sets public expectations to deal with the externalities they create, including those perceived by Wood (1991: 698) as “far afield from their primary and secondary involvements”.

Stakeholders may refuse to participate in reciprocating benefits with companies that disregard their wider societal responsibilities and can, therefore, contribute to the company's demise. To prevent this, any stakeholder with a stake in the particular corporate action needs to be considered due to their role as a salient legitimacy component (Freeman 1984). A broader variety of stakeholders need to be incorporated in developing a business strategy that is more effective than the traditional set consisting of owners/shareholders, managers and customers (Bhattacharya and Korschun 2008). The stakeholders include employees, governments, media, and the communities represented by various advocate groups, etc. (Freeman 1984; Aguilera, Rupp, Williams and Ganapathi 2007).

Different stakeholder perceptions of these desired operational practices introduce competing demands on the company's approaches to creating value (Jensen 2002). Not only do these perceptions vary across different stakeholder groups, but divergent perspectives are reported within specific stakeholder segments. Managers, therefore, need to find effective ways to deal with the competing demands both in terms of the specific stakeholder groups and the subgroups formed around shared perceptions (Wolfe and Putler 2002). According to Wood and Jones (1995), the type of power the constituents have over the firm's resources decides the pertinent stakeholder groups, yet these need to include both the direct and fringe or latent constituents (Mitchell, Agle and Wood 1997).

Aguilera et al. (2007) develop a theoretical framework that consolidates the competing considerations of multiple constituents in CSR management. Aside from the institutional and organisational level demands, individual stakeholders exert pressure on companies to adopt CSR based on the individual stakeholder motives. Employees, consumers, management, institutional investors or shareholders, governments, and NPOs are outlined as the multiple actors that pressure companies into acting in a socially responsible manner through their ability to facilitate and impede CSR at different levels. The different constituents are classified as insider and outsider groups based on their ability to directly affect strategic decisions. The interplay of the insider and outsider groups' motives can help to "uncover effective mechanisms that encourage firms to engage in CSR efforts" (ibid 2007: 853).

Socially oriented personal values and preferences of individuals within the business informed by social interactions outside their business related roles have been reported to influence CSR strategy (Drumwright 1994; Hemingway 2005; Brammer and Millington 2005). Providing personal satisfaction for the 'insiders' has been shown to lead to improved organisation identification (Berger, Cunningham and Drumwright 2006; Gond, El-Akremi, Igalens and Swaen 2010) and commitment (Brammer, Millington and Rayton 2007) which positively impacts business value. The activity also generates social value externally which caters to a range of 'outsider' stakeholders and can lead to enhanced reputation (Austin 2000; Yaziji and Doh 2009). Catering to a range of stakeholders is congruous with producing business value and, therefore, can complement profitability in a similar way to other business functions.

Accordingly, contrary to the argument that social objectives distract from profit seeking and reduce business value (Jensen 2002; Sasse and Trahan 2007), Kurucz and colleagues (2008) argue that the mere existence of the "business case for CSR" supports a justification for social objectives in business strategy. The authors outline cost and risk reduction, competitive advantage, reputation and legitimacy, and synergistic value creation typology, as the four key value propositions for CSR. The synergistic value creation model incorporates the three models, showing a progressive incorporation of social and economic concerns in CSR practice, i.e. each mode is inclusive of the last.

It is the most advanced mode of creating value in CSR that incorporates the social and economic concerns of this practice by relating and combining them in an innovative

fashion (Kurucz et al. 2008). Synergistic value creation denotes enlightened self-interest as a novel form of motive. According to Lakin and Scheubel (2010), enlightened self-interest denotes a win-win-win outcome (Kurucz et al. 2008). It integrates a tri-fold motive that includes: a) societal betterment efforts underpinned by appropriate ethics and values that b) drive an active approach to developing community projects with cross-sector partners, and c) positively impact the sustainability of the corporate bottom line (ibid 2010). Porter and Kramer (2011) suggest that enlightened self-interest as a principle motive of CSR yields profits infused with social purpose, creating shared value. Enlightened self-interest denotes win-win-win outcomes, considering that strategic motives are disclosed in efforts directed towards operational issues and responding to wider social objectives leads to no infringements on profitability.

Porter and Kramer (2011: 64) state that the number of corporations with a “hard-nosed approach to business [that] have already embarked on... re-conceiving the intersection between society and corporate performance” appears to be growing. However, the disparate approaches of companies to become more socially responsible continue to exert negativity on CSR. Moreover, the value-added of social responsibility to the corporate bottom line improvements remains disputed (van Oosterhout and Heugens 2008; Karnani 2011). Scholars point to inconclusive outcomes of the measurement tests between CSR and corporate financial performance (CFP), which is examined in the next subsection.

2.2.2.2 Empirical stance: CSR – CFP link

Empirical testing of the aggregate measurement tests between CSR and corporate financial performance (CFP) are inconclusive. Margolis and Walsh (2003) previewed over 120 studies spanning the past thirty years and report that although there is hardly any evidence of a negative association between these two variables, “a definitive link ... may turn out to be more illusory than the body of research suggests” (ibid 2003: 278). Orlitzky’s (2008) review of the potential link through psychometric meta-analysis finds that the results are decidedly mixed, although overall, there tends to be a positive, even though highly variable, relationship between CSR and CFP. Such variability of findings may relate to the lack of distinction between different CSR approaches. As commented by Ioannou and

Serafeim (2010: 14) “there is no such thing as a single monolithic CSR strategy”. Failing to acknowledge the multiple approaches to CSR is likely to influence the value outcomes, both financial and social. Eccles, Ioannou and Serafeim (2011) distinguish between companies that have a long history of voluntary environmental and social reporting, termed “high sustainability” from companies that have adopted almost none such policies, referred to as “low sustainability”. High sustainability companies “significantly outperform their counterparts over the long-term, both in terms of stock market and accounting performance” (ibid 2011: 1). This would suggest that CSR theory and practice lend support to the win-win-win proposition of advanced approach to CSR which sees greater value creation through a greater degree of integration between social and economic value.

Moreover, beyond the improved business performance, the different stages of integrating social objectives within business strategy influence the degree of socio-economic contributions of CSR to society. Understanding how businesses approach social value creation as part of their wider business strategy is likely to inform their approach to collaboration and, therefore, indicates a significant conceptual area for the thesis. The next section previews the conceptual efforts to classify the different stages of how businesses response to CSR.

2.2.2.3 CSR modes

Numerous typologies describe the different levels of CSR integration using different dimensions as a basis that include distinct principles and starting stage, etc. (Carroll 1979; Post and Altman 1992; Austin 2000; Zadek 2004; Porter and Kramer 2006; Mirvis and Googins 2006; Crowther 2008; Halme and Laurila 2009; Kourula and Halme 2008; Maon et al. 2010). For example, Zadek (2004) derives a continuum of five progressive organisational stages informed by the theory of moral development; these range from defence or denial of responsibilities to civil approach characterised by active advocacy of responsibilities. Maon et al. (2010: 29) consolidate the varied typologies by integrating the notion of stakeholder culture with the CSR development stage typologies as a way to “establish links across moral, cultural and organizational elements which mark an organization at different stages”. The framework acknowledges individual stakeholders within companies as significant drivers of

CSR (Drumwright 1994; Hemingway 2005; Aguilera et al. 2007; Daellenbach et al. 2013). Stakeholder culture denotes a socially constructed driver to CSR response, as it reflects a unified response to societal pressures encountered by the organisation that the individual organisational actors learned together to overcome.

Three main phases represent the cultural and moral level: CSR cultural reluctance characterised by ignorance and self-interested orientation focused on financial benefit; CSR cultural grasp that views CSR as a value protector; and CSR cultural embedment representing integrative orientation. The phases consist of seven developmental stages ranging from a dismissing stage to a transforming stage (ibid. 2010). Cultural embedment is largely consistent with the prior work of Googins et al. (2006) who propose that the advanced approaches are characterised by altering stakeholder reciprocity from unilateral to mutually regarding and conjoined. The relations move towards greater engagement with community stakeholders to enable increased complementarity of resources to create multitude of value synergistically. Consequently, businesses differ in terms of motivations behind CSR and the activity adopted. The overemphasis on the strategic aspect in the initial phases has however attracted criticisms that CSR in this context is used for cosmetic, image building purposes rather than contributing to social welfare (Karnani 2011). To overcome the stakeholder scepticism, many large businesses implement complex community involvement programmes as part of their CSR strategy. Corporate community involvement (CCI) as a distinct approach to advanced mode of CSR enables businesses to develop collaborative projects with cross-sector partners in their locality that include nonprofit arts organisations (Lakin and Scheubel 2010). CSR literature, therefore, positions collaboration with nonprofits as an advanced highly legitimate approach to incorporating social objectives into business strategies enacted through CCI programmes. The next section briefly looks at CCI as a distinct approach through which businesses integrate social objectives into the business value proposition.

2.2.3 Corporate Community Involvement (CCI)

CCI is underpinned by the 'new social contract' that emphasises 'collaborative governance' through "participatory responsibility of all sectors for co-creating societal innovations and change" (Lakin and Scheubel 2010: 3). Burke (1999: xvi) defines CCI as

"The state of relations between the company and the communities in which it has a presence or impact. It encompasses programs that advance the interests of both the company and its communities [and] involves the impact of the operations activities of the company and its communities as well as programs established to develop relationships with groups and organizations in communities."

Relationships with various NPOs are developed as a way of strengthening the enlightened self-interest with the intrinsic social 'kudos' of NPOs. Austin and Seitanidi (2014) see cross-sector relationships as a highly constructive way to incorporate social objectives due to the opportunity to realise social and economic missions concurrently. As noted by Pearce II and Doh (2005: 32) "the collaborative approach consistently outperforms others". Both the NPOs and the businesses reportedly achieve greater value outcomes by working collaboratively (Austin 2000; Googins, Mirvis and Rochlin 2007; Bowen, Newenham-Kahindi and Herremans 2010; Seitanidi 2010). According to Seitanidi and Ryan (2007), CCI represents an 'umbrella term' for categorising different structures that have developed around NPO-business collaboration phenomenon. The distinct structures significantly influence the value generating capacity of collaboration. Therefore, before discussing collaborative value creation, the different structures that have developed around the NPO-business collaboration phenomenon reported in literature will be discussed next.

2.3 Collaboration structures

The varying degree to which the different approaches to collaboration are reported to contribute to societal betterment suggests that the ability to create societal value rest on specific structural and governance characteristics of the different structures that have

developed around the NPO-business collaboration phenomenon. Corporate philanthropy as the foundational field of NPO-business interactions is therefore briefly examined before attention turns to the collaboration continuum (Austin 2000) as the leading framework for examining NPO-business collaboration. The emergence of the CSR related motive as a driver of CCI and the increased institutionalisation of CSR as a way of doing business in contemporary society prompted a greater degree of interaction between NPOs and businesses. It introduced novel, more complex types of interactions than the traditional philanthropic donations, to include CRM, social partnerships and various joint ventures, etc. (Waddock 1988; Wymer and Samu 2003). However, until relatively recently, the interactions were researched under the auspices of corporate philanthropy (CP) which traditionally assumes selfless giving instead of instrumental motives (Young and Burlingame 1996). The literature on corporate philanthropy forms the foundational basis of NPO-business interactions and so the following section will briefly review CP as the traditional domain for examining interactions between business and society, and the issues that have impeded its emergence as the 'umbrella concept'.

2.3.1 Corporate philanthropy

The dominant idea within CP literature has traditionally revolved around altruism as the motivating principle behind corporate involvement in the societal sphere and was understood as selfless giving to a needy recipient (Gan 2006; Moir and Taffler 2004). However, the recent shift in the original sense of CP as "mak[ing] gifts to a nonprofit organisation without *any* expectation of commercial reward" (Bennett and Sargeant 2005: 798) towards strategically motivated engagement in the 1980s has altered the focus. CP has begun to centre on enhancing the bottom line, whilst also paying attention to effective stakeholder management (Saia et al. 2003). While for some scholars the incorporation of strategic intent is at odds with the original altruistic notion (Burlingame 2001), embedded in this notion was the need to enable managers to balance the divergent stakeholder demands.

Saia et al. (2003) assert that CP signifies an amorphous construct, in that it can take on a variety of forms. Crane, Matten and Spence (2008) suggest that the closer links

between business and community groups, together with connecting employee volunteering with human resource strategies, and linking philanthropic efforts with marketing strategies form the key innovations in the bilateral value adding of CP, and underpin the shift from philanthropy as a charitable act towards “strategic philanthropy” (ibid 2008b: 267). Strategic philanthropy incorporates the dual objective function: benefiting financial and social welfare.

However, minimal effort is typically expended in research on understanding CP as a bilateral relationship. A lacuna of knowledge related to the NPOs’ perceptions within this body of research is reported (Al-Tabbaa, Leach and March et al. 2012). Evading the social element by focusing solely on the business case prevents a holistic understanding of the effects the relationships have on society (Halme and Laurila 2009; Austin and Seitanidi 2014). A dyadic perspective can provide an understanding of the implications of collaboration for both parties involved, i.e. what each partner brings, acquires and concedes in generating value for society. Although CP remains an important area of investigation (Matten and Spence 2008), nowadays it is largely examined as the initial stage of the continuum of NPO-business collaborations (Austin 2000) that consider both NPO and business perspectives, as well as that of the wider society. This is the area that the attention turns to next.

2.3.2 The NPO-business collaboration continuum

NPO-business collaboration typologies focus on the level of engagement between the partners, outlining varied categorisations of the relationships: low to high intensity (e.g. Rondinelli and London 2003), forms of exchange (e.g. Googins, Mirvis and Rochlin 2007), multiplicity of partners from focused to communal (Peloza and Falkenberg 2009) and/or the flow of communication and information sharing (e.g. Alberic and van Lierop 2006; Morsing and Schultz 2006). Bowen et al. (2010) integrate the findings of over 200 community engagement studies into a continuum of community engagement based on factors that include corporate stance and level of engagement, etc. The continuum derives three progressive forms of engagement starting with transactional, transitional and the final transformational strategy. However, the definition of transitional collaboration lacks explicit

analysis of the relational characteristics and governance mechanisms, making it unsuitable as a basis for examining value creation potential.

Seitanidi (2010) advocates Austin's (2000) Collaboration Continuum (CC) as an instructive analytical framework through which multilevel outcomes can be analysed. Austin plots the varied relationships against a continuum according to the degree of evolution. The continuum consists of three consecutive stages according to the structural arrangement, level of intensity and alignment, and value generating potential of the relationships: philanthropic, transactional, and integrative. The stages moderate the outcomes of the alliance, as they inform the source and magnitude of resources that can be mobilised to generate value. Austin (2000) outlines generic resource transfer, core competencies exchange and joint value creation as the progressive nature of resources deployed as the relationship develops, with each increment producing greater magnitude of socio-economic outcomes.

In the philanthropic stage, the relationship is that of a charitable donor and recipient with minimal contact. The collaboration does not form part of either organisation's mission, and it "is highly circumscribed in terms of resources deployed and points of interaction" (Austin 2000: 20). Resource flow is unilateral from donor to recipient. Each side benefits modestly – the NPO through increased funding and the company through reputation enhancements as a good corporate citizen, yet "their mutual benefits [are] real and not insignificant" (ibid 2000: 22). Typically, albeit not always, the introductory relationship progresses into a transactional stage distinct by more intensive interactions. More open dialogue enables partners to identify commonalities and potential strategic fit between organisational objectives and capabilities. Resource exchange becomes more bilateral (Googins and Rochlin 2000), although it often resembles a buyer-seller relationship rather than a collaborative relationship. Beyond "the focus on the deal between the partners" (Austin 2000: 23), resources include in-kind support, employee volunteering and specific skills/expertise exchange.

The specific types of interactions include CRM, event sponsorship, licensing, paid service projects and employee volunteering. The social aims of the philanthropic stage become strategically oriented (Seitanidi 2010). The strategic emphasis denotes self-interested motivations that offer greater sources of competitive advantage (Porter and Kramer 2006). Austin (2010) nonetheless maintains that the magnitude of resource type

and scope transferred to NPOs leads to greater societal outcomes than in the philanthropic stage, or indeed, that which the NPO could generate alone. The integrative stage sees the “partners’ missions, people and activities” (Austin 2000: 26) join into a “we mentality” (ibid 2000: 36), “the alliance becomes institutionalised” (ibid 2000: 26). The relationships centre on a commitment to community values and transform into partnerships as a distinct “higher level of interactions” (Seitanidi and Ryan 2007: 247) where greater magnitude of benefits is generated through joint value creation efforts (Austin 2000). Figure 2 shows a summary of each stage.

Figure 2: Collaboration Continuum Austin (2000)

	Stage 1	Stage 2	Stage 3
NATURE OF RELATIONSHIP	Philanthropic	Transactional	Integrative
Level of Engagement	Low		High
Importance to Mission	Peripheral		Central
Magnitude of Resources	Small		Big
Scope of Activities	Narrow		Broad
Interaction Level	Infrequent		Intensive
Managerial Complexity	Simple		Complex
Strategic Value	Minor		Major

Austin (2000) states that collaboration can progress through the stages, but it can also skip a stage, or indeed retain the relationship within a particular stage. Some relationships may progress only in certain aspects of their collaborative arrangement and opt for an “intentional hybrid” (ibid 2000: 35). The different types of relationships that Austin (2000) lists under transactional stage appear to embody a hybrid form as they are structured from elements from across the stages (Austin 2000).

However, Austin (2000) only parenthetically indicates the specific types of relationships effective under each stage. Although these different types of relationships share certain characteristic that categorise them as part of the distinct evolutionary stages, such as the level of engagement, etc., the differences in the structural, managerial, motivational and outcome elements are likely to influence their value creating aptitude. Therefore, the different relationship types in NPO-business collaboration and their distinct characteristics reported in extant literature will be discussed next.

2.3.3 NPO-business relationship types

Wymer and Samu (2003) present a typology that classifies corporate philanthropy, corporate foundations, licensing agreements, sponsorship, transaction based promotions, joint-issue promotions and joint ventures as a set of specific types of NPO-business relationships. The typology uses managerial approaches, motives and outcomes, and risks to structure the individual relationship types (see table 2 for breakdown). Corporate philanthropy is executed directly by the company whereas corporate foundations are managed through a separate nonprofit entity established by the company. Motivations and outcomes are closely related and centre on the NPO's ability to achieve its mission, where the business partner expects intangible compensation rewards.

Table 2: Breakdown of motives, risks and degree of commitment, adapted from Wymer and Samu (2003).

	Motives NPO	Motives Business	Risk NPO	Risk Business	Commitment **
Traditional CP	1. Funding 2. Publicity	1. Social objective 2. PR 3. customer relations 4. employee relations	- Reputation & image damage - Sudden withdrawal of corporate support due to 'laissez faire' nature of support	- Reputation & image damage - Shareholder & employee opposition	Lowest
Corporate foundation	1. Funding 2. Publicity	1. social objective 2. PR 3. customer relations 4. employee relations	- Reputation & image damage - Sudden withdrawal of corporate support due to 'laissez faire' nature of support	- Reputation & image damage	
Licensing Agreement	1. Funding 2. Publicity	1. sales 2. PR 3. customer relations 1. social objective	- reputation/ image damage, - reduced funding - sudden withdrawal of corporate support	- Reputation & image damage - sales/market share loss (linked to NPO scandal)	
Sponsorship	1. Funding 2. Publicity	1. customer relations 2. PR 3. employee relations 4. social objective 5. sales	- reputation/ image damage, - reduced funding - sudden withdrawal of corporate support.	As above	
Transaction based promotion	1. Funding 2. Publicity	1. customer relations 2. sales 3. social objective 4. PR 5. employee relations	- reputation/ image damage, - reduced funding - sudden withdrawal of corporate support.	As above	
Joint issue promotion	1. Operation support 2. in-kind support 3. Funding 4. Publicity	1. social objective 2. customer relations 3. PR 4. employee relations	- Reputation & image damage - Sudden withdrawal of corporate support	As above	
Joint venture	1. Operational support 2. in-kind support 3. Funding 4. Publicity	1. PR 2. customer relations 3. social objective 4. employee relations	- reputation/ image damage, - reduced funding - sudden withdrawal of corporate support.	As above	highest

*– NPO has control over how sponsor advertise association. BUS exercise power through payment of fee

** - resources and managerial time

Licensing agreements constitute a marketing related function. Companies pay a flat fee to use NPOs' names and logos based on "strong, favorable images... in the minds of important market segments" (ibid 2003: 10). Business motivations are commercially laden,

and the mission of NPOs is secondary. Sponsorship, transaction-based promotion – better known as CRM (Varadarajan and Menon 1988) – and joint-issue promotion progress from a purely marketing management function towards incorporating social objectives and entering the PR arena of business management. However, each type displays distinct characteristics. Sponsorship is the reverse of licensing (Wymer and Samu 2003). A business pays the NPO a fee to include its logo in the NPO's marketing communications, whilst the company leverages the sponsorship in their own communications (Cornwell and Maignan 1998). The framework recognises various types of sponsorship which include sports, culture and education, etc. It is primarily a commercially driven activity to promote company brand, but "sponsors also want to fund/promote the event" (Wymer and Samu 2003: 11). Bennett and Sargeant (2005) suggest that the sponsorship of an NPO is essentially a form of CRM since the sponsoring firm receives benefits tied to the sponsorship deal. Burlingame (2001: 4) contends that sponsorship is different as it is not directly tied to consumers' purchase behaviour. Daellenbach et al. (2006) further suggest that there are structural differences, particularly where sponsorship is concerned with supporting social phenomena. Accordingly, Wymer and Samu (2003) define CRM as a distinct type using Varadarajan and Menon's (1988) definition as a marketing-related activity where contributions to a cause are linked with and in proportion to customer purchases. It is overtly commercial as the cost to advertise these relationships often exceeds the contributions to the cause, with the business partner firmly in control of the relationship.

In contrast, in joint-issue promotion, the power balance becomes more symmetrical and the motives for the relationship centre on social gains (Wymer and Samu 2003). The organisations work together to promote a cause. However, the business motives diverge from philanthropic engagements and businesses champion a cause which is important to their customers. Joint-issue promotions resemble 'social partnerships' defined by Waddock (1988) as relationships that require active participation by the interacting parties and the provision of resources (not solely financial) to address problems in the social arena that concern everyone involved.

Wymer and Samu (2003) state that joint ventures are the most advanced relationship type. The mutually desirable objectives are pursued through a shared ownership of a nonprofit entity by the partners. In some cases, typically in joint ventures between manufacturing companies and environmental groups, the relationship is

characterised by the shift from adversary relations between NPOs and businesses towards co-operation as a way of generating mutually desirable objectives (Bendell 2000). The new entity develops standards, monitors the business compliance, and manages various certification programmes. Compliant businesses receive the right to use certification logos to signal their social orientation (Wymer and Samu 2003).

However, Wymer and Samu (2003) restrict the analysis of the different relationship types to the outcomes, specifically the organisational outcomes. Seitanidi and Ryan (2007) contend that the overt 'outcomes orientation' comes at the expense of understanding the processes of interactions even though the distinct processes are at the root of the proliferation of the different associational forms. For example, as corporate philanthropy was appropriated for commercial objectives, it triggered the conceptualisation of strategic philanthropy as a way of overcoming the criticisms related to the underpinning altruism demands of philanthropy (Saiia et al. 2003). Seitanidi and Ryan (2007) further suggest that understanding the processes of interactions along with the motivations and outcomes uncovers the power structures as the cause of the tensions between the social and economic primacy of the interactions. As such, it influences the value creation function of the relationships.

Seitanidi and Ryan (2007) organise the interactions along Austin's (2000) collaboration continuum to integrate the processes of interactions with the outcomes orientation. Accordingly, corporate philanthropy reflects the processes and outcomes of the philanthropic stage of CC (Austin 2000). Sponsorship and CRM are classified as distinct, exchange based interactions and form part of transactional stage of CC (Austin 2000). Despite moving towards more symmetrical relations in terms of the contributions noted by Wymer and Samu (2003), Seitanidi and Ryan (2007) suggest that the power relations in transactional dyads assign the NPO in the role of client to the business partner. CRM broadly mirrors Wymer and Samu's (2003) classification, but it is presented as an umbrella concept. It incorporates licensing programmes due to the commercial motivation of gaining advantage by being associated with a good cause and joint-issue promotion due to the emphasis on a particular cause rather than a wider societal well-being (Seitanidi and Ryan 2007: 253).

The key departure from existing frameworks is the conceptualisation of sponsorship as a twofold construct by elaborating on the (mis)appropriation of sponsorship for

commercial purposes (Seitanidi and Ryan 2007; Ryan and Fahy 2012). Seitanidi and Ryan (2007) classify two distinct types of sponsorship depending on whether the underpinning principles are commercial or socially oriented and if the divergent emphasis is on outcomes versus processes and outcomes. Socio-sponsorship operates in contrast to commercial sponsorship. It aims to primarily meet social objectives and gain compensation rewards on the back of it. Corporate social responsibility replaces the promotional and reputational outcomes associated with commercial sponsorship. Socio-sponsorship focuses on developing long-term relations with stakeholders in the locality through engaging with the community and contributing to social good (Seitanidi 1999, cited in Seitanidi and Ryan 2007). However, the lack of differentiation between socio-sponsorship and commercial sponsorship is prevalent and perpetuates criticisms that the asymmetrical power relations enable businesses to exploit NPOs for selfish economic benefits linked to ostensible CSR motivations. Seitanidi and Ryan (2007) suggest that social partnerships have emerged as a relationship type that re-aligns the interactions to stakeholder expectations. Farrelly, Quester and Burton (2006: 1023) posit that social partnerships are a “natural process of advancement”. They are underlined by ongoing proactive initiatives and “reciprocal altruism” where trust and commitment and the related prohibitive restrictions play a focal role in mutual benefits generation (Ellson 2008, p. 573). Through mutual reciprocity, the virtuous circle emerges which contributes to sustainable societal development (Waddock and Graves 1997). This form of partnering is a highly effective and efficient mechanism to maximise value for all parties involved. Such collaboration may essentially lead to a unique “collaborative advantage” (Huxham 1993; Porter and Kramer 2006) or “added-value” (Nelson and Zadek 2000). Nelson and Zadek (2000) previously suggested that greater efficiency, effectiveness and equity in the alliance processes can increase the potential benefits not only to the partners but also to society. Seitanidi and Ryan (2007), therefore, position social partnerships as a specific relationship type of the integrative stage (Austin 2000). However, Seitanidi and Ryan (2007) note a repeat of the appropriation of social partnerships in order to serve the purposes of business. This, according to Austin and Seitanidi (2014) prompted a theoretical conceptualisation of transformative collaboration as a new, currently emerging stage of the original CC (Austin 2000). Googins et al. (2007) previously conceptualised the transforming stage as the ‘frontier’ generation of collaborative relationships.

A distinct characteristic from the integrative stage is the complex structural arrangements that progress from dyadic engagements to multiparty collaboration. Multiparty co-operation is considered as the conditional mode of re-organising endemic systems that are constitutive of social problems. The relationships aim to “change the game of business” and involve “cross-industry and multisector co-operation in addressing societal ills” (Googins et al. 2007: 89-90). Table 3 (p. 57) provides an overview of the different relationship types reported in the literature.

Despite the promise of a significant impact on the societal betterment of the latest structures that develop around the phenomenon of collaboration, Seitanidi and Ryan (2007: 259) point to an ongoing “gap between rhetoric and reality” of social partnerships, reported in early collaboration literature (e.g. Waddock 1988; Googins and Rochlin 2000). More recent studies acknowledge that this issue persists (Kim 2009; Di Domenico et al. 2009; Bowen et al. 2010; Seitanidi 2010). Moreover, Googins et al. (2007: 90) suggest that businesses don’t fall firmly into one developmental stage: “in some aspects... firms are integrated, in others innovative, and in still others just getting started”. Similarly, Seitanidi (2010) reports that even in institutionalised, long-lasting relationships, the interaction can only be described as a ‘partnership approach’ rather than a full social partnership. Organisational outcomes are prioritised over societal outcomes and societal benefits lack overt intentionality from the outset (Seitanidi 2010). The dearth of the advanced structures appears to suggest that contributing to societal betterment through collaboration is not necessarily contingent upon the existence of relationships that typify integrative and/or transformational stages. Rather, it shows that research is yet to uncover processes through which the distinct relationship types of the transactional stage generate value that can produce transformational outcomes. The following section will discuss this gap in extant literature.

2.3.4 NPO-business collaboration gap: Hybrid transactional relationships

The partnership approach (Seitanidi 2010), links closely with the hybrid structures proposed by Austin (2000). Collaboration hybrids are embedded in a specific stage, but they integrate characteristics that belong to different stages of relationship maturity. In

transactional collaboration, relationships may adopt a long-term orientation and work closely together. This distinct structural element helps overcome the structural and processual demarcation of the transactional stages can and influence the overall outcomes generation potential of the relationship (Austin 2000). Compared with purely transactional relationship types, transactional hybrids can generate a greater magnitude of value at all levels and the proximity between the organisations is tighter. However, since the intentional convergence of vision related to improving society as a specific characteristic of the integrative stages is missing, the approach remains embedded in transactional stages. If approached from the business perspective, the associational form relates closely to socio-sponsorship. As defined by Seitanidi (1999, cited in Seitanidi and Ryan 2007), socio-sponsorship is a transactional but socially oriented interaction. This positions it closer to the more advanced stages in terms of contributions towards societal betterment. However, neither socio-sponsorship nor partnership approach types have received appropriately focused academic examination beyond the initial conceptualisations by Seitanidi (1999, cited in Seitanidi and Ryan 2007: 252, 2010).

As suggested by Austin (2007: 65), to advance “the frontiers of knowledge and practice”, both theoretical and applied understanding of the phenomenon needs to be deepened. Seitanidi’s study (2010) provides some initial insights of the underpinning principles of transactional hybrids. She suggests that although a partnership approach can result in societal outcomes, it cannot be considered as an alternative governance mechanism for sustainable societal development. It lacks intentionality and mutuality when addressing a social problem. The ability to generate positive societal value using asymmetrical power relations as found in the scoping study (Knight 2010), provides some insights into the governing mechanisms. However, little empirical insight exists into how and to what effect transactional hybrids contribute to value creation for society. Developing a detailed understanding of the different approaches to transactional collaboration and their effect on societal betterment is one of the aims of the thesis.

Table 3: Breakdown of NPO-business relationship types*

	CC Stage	Magnitude of resources/relationship intensity	Operating principle/motive	Power structure	Societal outcomes priority	Value flow/strategic value
Corporate philanthropy	philanthropic	Low, informal - cash/in kind support for NPO & image for BUS - few individuals involved (CEOs)	Social, with modest organisational benefits/altruism, enlightened self-interest	Imbalance – business as investor	Peripheral	Asymmetrical/modest
commercial sponsorship	transactional	Modest, contractual - cash/in kind for NPO & marketing benefits for BUS - marketing & fundraising departments	Strategic, no direct social intent	Imbalance – business as investor		
CRM	transactional	Modest, contractual - cash for NPO & marketing/sales increase for BUS - marketing & fundraising departments	Strategic, with funding for supported social cause	Imbalance – business as investor		
socio sponsorship/partnership approach	Transactional/ hybrid	More active, typically contractual - cash/in kind augmented by competencies exchange and employee involvement - led by shared vision of top execs in CSR & stakeholder engagement teams but diffused throughout organisations due to competencies exchange & employee involvement	Social, with compensation reward on organisational level/CSR, enlightened self-interest	Imbalance – business as investor		
Social partnership	integrative	Core competencies exchange focused on addressing specific social problem - intensive co-operation with dedicated teams, relationships institutionalised in organisational cultures	Shared value creation/proactive CSR	Balanced – interdependency	underpinning	
Collaborative social entrepreneurship	transformative	Core competencies pooled to create new organisational structure focused solely on inducing systemic change - synergistic value creation	Societal betterment/societal sustainability	Balanced – interdependency		Symmetrical/major

*Relationship types according to the CC stages: magnitude of resources/relationship intensity, operating principle/motive, power structure, societal outcomes priority and value flow/strategic value dimensions as derived from Austin 2000; Samu and Wymer 2003; Seitanidi and Ryan 2007; Seitanidi 2010; Austin and Seitanidi 2014

2.4 Summary

This chapter has discussed the broad parameters of NPO-business collaboration that extant literature considers pertinent to its ability to create value for society. Firstly, the chapter discussed the role of the developments in the nonprofit sector that altered the traditionally antagonistic view towards the private sector (Crane 2010). This was followed by discussing the gradual incorporation of social responsibility in business strategy as encompassed in the CSR concept. Specifically, the section focused on how the social objectives are incorporated as part of CCI. The chapter briefly visited Austin's concept (2000) of the developmental stages of collaboration, then discussed the distinct structural characteristics of specific relationship types and their processual outcomes. Since integrative and transformational collaboration approaches are rare, the specific processes within transactional collaboration need to be investigated to improve understanding of how NPO-business collaboration can contribute to societal betterment. The review has, therefore, highlighted the gap in extant literature on this subject.

Accordingly, chapter 3 will evaluate the current understanding and nascent thinking in relation to value creation via different approaches to NPO-business collaboration.

CHAPTER 3: SOCIETAL VALUE CREATION IN TRANSACTIONAL COLLABORATION

3.1 Introduction

This chapter will evaluate the literature related to the capabilities of NPO-business collaborations to contribute to societal betterment, with a specific focus on transactional collaboration. The review will build on the literature introduced in chapter 2 and value creation through collaboration in the context of CC (Austin 2000) will be evaluated. Collaboration stages will be discussed as the mediating factor of societal value creation and of the processes that operate its generation (Austin 2000; Austin and Seitanidi 2014). Value creation through different types of transactional relationships will be reviewed to evaluate how the different structural characteristics may influence the magnitude of value creation for society. The emergent opinions on the implications of transactional hybrids and transactional relationships portfolios on societal value creation will also be examined (Austin 2000; Kim 2009; Ryan and Fahy 2012). The multistage characteristics of transactional hybrids can overcome some of the structural limitations of traditional transactional relationships and managing portfolios of transactional relationships will be discussed as a route to overcoming the structural and governance limitations of transactional relationship dyads to induce societal betterment.

Understanding how NPO-business collaboration contributes to societal betterment requires identifying by whom (Le Ber and Branzei 2010a), and for whom and where benefits are created (Selsky and Partner 2005; Austin and Seitanidi 2014). The review will discuss that the lack of integration of individual level perspective in current research impedes a holistic understanding of how transactional collaboration can create benefits beyond the collaborating organisations and their individuals, will be discussed. Value creation at different levels of analysis will also be discussed, to include the individual – micro, organisational – meso, and societal – macro level. In particular, the discussion considers how integrating the individual beneficiary perspective into the prevalent organisation-centric standpoint in the relational processes perspective of value creation may contribute to a more comprehensive understanding of societal value creation. This leads to the

appraisal that the underdeveloped understanding of macro level value is the missing link that has prevented full integration of the social aspect into NPO-business collaboration.

The overemphasis on descriptive outcomes raised in literature and the need to integrate interactions based perspective is also examined. It will be argued that these issues impede a more holistic understanding of how outcomes emerge that can contribute to sustainable value for society. Context as the complex set of nested internal and external structures and processes that underpin processual approach to research will be discussed as a guiding principle that can inform the analysis of value creation in transactional collaboration (Pettigrew et al. 2001). The chapter closes with presenting the arts as the contextual setting that requires a relational perspective to value creation (Boorsma 2001; Kern 2006; Di Domenico et al. 2009; Le Ber and Branzei 2010).

3.2 Collaboration and value creation

NPO-business collaboration has proliferated in recent years. The increased attention and resources invested to developing and managing these relationships has raised questions about their effectiveness to deliver the espoused societal betterment. According to Austin (2000), the value of collaboration to each partner as well as to society has become the “central justification for cross-sector partnering” (Austin and Seitanidi 2012a: 728). As was discussed previously, the two key types of value collaboration creates are social and economic value, which is generated through a combination of socio-economic benefits at an individual, organisational and societal level (Selsky and Parker 2005; Le Ber and Branzei 2010; Austin and Seitanidi 2014). These can also occur through their combination by examining the interactions within and between the levels (Seitanidi 2008; Kolk et al. 2010). Novel forms of benefits can emerge by combining the unique resources held by the collaborators and this can lead to innovations that are capable of creating systemic changes (Austin and Seitanidi 2014).

However, as chapter 2 discusses, collaboration requires a degree of intersection in values, interests and shared benefits to function as effective mechanisms to contribute to societal betterment (Waddock 1988; Austin 2000; Berger et al. 2004; Selsky and Parker 2005, 2011; Porter and Kramer 2006, 2011; Di Domenico et al. 2009; Le Ber and Branzei

2010b; Austin and Seitanidi 2014). These vary significantly across the different structural, governance and goal orientation arrangements. The ensuing sections will preview these elements as they are shown in extant literature.

Austin (2000) suggests that the structural characteristic of partner organisations, in particular the planned alliance, set expectations about the value generating potential of collaboration: “the perceived worth of an alliance is the ultimate determinate of, first, whether it will be created and, second, whether it will be sustained” (ibid 2000: 87). Identifying the multiple potential benefits for each partner contributes to defining value. Austin further posits that greater strategic potential accrues in more advanced relationships, making them worthy of the more complex evaluation processes. Although much research on NPO-business collaboration considers that organisational self-interest is the driver of these interactions (Porter and Kramer 2006), a number of scholars argue that the decisive measure of the worth of any collaboration that entails a social purpose derives from creating outcomes beyond the benefits for the partners (Waddock 1988; Austin 2000; Glasbergen 2007; Austin and Seitanidi 2014). Austin and Seitanidi (2014) proclaim that NPO-business collaboration entails the ability to benefit both the interacting organisations and society. Hence, both private and societal returns from the relationship need to be accounted to determine “how society is better off because of their joining of resources and efforts” (Austin 2000: 88). As further cautioned by Austin (2000: 87-101) “The perceived worth of an alliance is the ultimate determinant of ... [its] viability ... not only to the partners but also to society”.

However, Seitanidi (2010) notes that Austin focuses predominately on the organisational level benefits, without elaborating fully on the implications for wider society. The social dimension embodies the gap in literature that prevents the holistic understanding of the impact of collaboration on wider society (Halme and Laurila 2009). In her study on the politics of NPO and business partnerships, Seitanidi presents social and societal dimensions alongside the traditional organisational outcomes that collaboration can produce. Social outcomes are directly related to the activity of the NPO and refer to benefits that are generated by the NPO through the business support. Societal benefits encompass benefits that are “a result of the combined efforts of the two partners and which are delivered externally to society and not to the partner organisations” (ibid 2010: 149). For outcomes to be considered as societal, the partnership must also be “developed around this theme” and

the attainment of the specific societal outcomes must be prioritised (ibid 2010: 128). The distinction provides significant initial insights into how collaboration can contribute towards societal betterment by defining the relationship characteristics, in terms of how it is structured and governed (Iyer 2003). However, whether and how these distinct outcomes translate into different modes of value capable of inducing societal betterment remains largely unknown. The thesis attempts to contribute to this area.

Before moving in that direction, the next sections will look at how literature so far has understood value creation through NPO-business collaboration. It discusses the implications of different collaborative approaches and relationship types on value creation. In order to understand how the different types of interactions may contribute to societal betterment, Austin and Seitanidi (2014) suggest that it is necessary to understand for whom and where benefits are created. This chapter evaluates the current thinking about the levels and locations of benefits accrual. Studies further indicate that understanding the different levels and locations of benefits generation may assist in deriving how benefits transfer within and across the different levels and locations (Seitanidi 2008; Kolk et al. 2010; Vock et al. 2011). The emergent thought on the implications for value creation of the interactions between and across different benefits will be previewed.

3.2.1 Collaborative value creation framework (CVC)

Value creation as the central component of NPO-business collaboration is not a new subject, yet the diverse approaches through which it has been studied have only recently been consolidated into an analytical framework by Austin and Seitanidi (2012 a, b; 2014). The framework consists of four key components: value creation spectrum; relationship stages; partnering processes; and partnering outcomes. Each component provides “a different window through which to examine the co-creation process” (ibid 2012a: 728-729). The framework elaborates on the multitude of social and economic value potential. Collaborative value denotes:

“... the transitory and enduring benefits relative to the costs that are generated due to the interaction of the collaborators and that accrue to organizations, individuals, and society.” (Austin and Seitanidi 2012a: 728)

Four sources of value exist, to include: resource complementarity which elaborates on the fit aspect (Berger, Cunningham and Drumwright 2004); resource type that includes the traditional generic resources and core competencies (Austin 2000); resource directionality and use that distinguishes between unilateral, reciprocal and the ‘conjoined intermingling’ of resource flow (Austin 2000; Austin and Seitanidi 2014; and linked interests where the individual understanding of value and reconciling perceived differences is advanced (Le Ber and Branzei 2010b; Austin and Seitanidi 2014). The combination of the elements produces four sources of value: associational value as benefits that arise merely from being associated with the partner; transferred resource value to infer benefits derived from the exchanged resource; interaction value to include the intangibles resulting from working together; and synergistic value (Austin and Seitanidi 2014). Synergistic value resembles the synergistic model of value creation discussed in chapter 2 as the frontier of value creation in CSR initiatives (Kurucz et al. 2008).

The relationship stages mirror the CC (Austin 2000) and incorporate the transformational stage (Googins et al. 2007) as outlined in chapter 2. The formation and implementation activities categorised by Selsky and Parker (2005) form the partnering processes category, where “the nature of value creation processes in collaboration” is examined (Austin and Seitanidi 2012b: 930). The implementation activities are explicated through the processes of implementation identified by Seitanidi and Crane (2009) as relationship selection, design and institutionalisation, and this allows a comprehensive clarification of the dynamic processes of value creation to emerge.

The final window for examining value creation activities is the outcomes category described as “the resultant internal and external benefits costs, and partnership outcomes” (Austin and Seitanidi 2012b: 930). Locationality of value denotes a principle factor of the framework. Two ‘loci’, within the collaboration and external to it, are distinguished:

“Internally, we examine value accruing at the meso level for the partnering organizations and at the micro level for the individuals within those organizations. Externally, we focus on societal welfare and its improvement as a result of the collaboration in the form of benefits at the micro (to individual recipients), meso (other organizations), and macro (systemic changes) levels.” (ibid 2012b: 945)

The framework organises not only the levels of analysis as individual, organisational, and societal; but it also specifies two locations of value creation. Firstly, value can be created inside the collaborative action – internal value creation. Secondly, value that is created for the wider external community and society constitutes external value creation. Austin and Seitanidi (2012b) propose that much current understanding lacks appropriate analytical depth. The interactions between the levels and the internal/external dimensions in particular offer potentially significant insights into how NPO-business relationships can create sustainable value for society (Seitanidi 2008; Austin and Seitanidi 2014). This is the area of investigation that the thesis pursues, as discussed below.

The broad research problem in the thesis concerns how NPO-business collaborations create sustainable value for society. Therefore, the outcomes category would appear as an instructive basis for the conceptual focus here. However, this approach assumes that the unit of analysis falls neatly within the predefined CC stages that essentially determine its respective societal value creation capacities (Austin and Seitanidi 2014). As was discussed in chapter 2, praxis tends to defy such linear theorising (Waddock 1988; Googins et al. 2007; Seitanidi 2010) and many relationships are characterised by a variability of their contributors to value creation on the CC stages (Austin 2000). Hence, this approach appears tenuous. It may lead to overlooking the more subtle micro-processes (Kolk et al. 2010) that stem from the transcending boundaries of specific relationship types and approaches to managing collaboration. Instead of focusing on the outcomes window, Austin and Seitanidi (2014) indicate that the different components of the CVC framework interrelate will be adapted. The next section takes a closer look at value creation in light of the inter-related categories of relationship stages, relationship processes and outcomes.

3.2.1.1 Integrating relationship stages, partnering processes and value spectrum and outcomes in pursuit of societal value

Austin (2000) suggests that the level of interaction between the organisations entails a significant impact on the worth of the alliance to both partners due to the interplay of social and financial value. The types of outcomes achievable for society form the primary differentiator between the different stages which are influenced by the increasing magnitude and opportunities to combine resources to produce value synergistically; to co-create value (Austin 2000; Seitanidi 2010; Austin and Seitanidi 2012b). Austin and Seitanidi (2014) outline three value drivers: alignment, engagement and leverage, each consisting of a number of value contributors that help differentiate between the different stages (see figure 4 p. 73 for breakdown of value contributors). The contributors under each of the drivers generally indicate the increasing, deepening and broadening complexity of the interactions as they move from philanthropic to transformational stages. The progressing direction of the value contributors shows that the capacity of the relationships in each stage to contribute to societal betterment changes from fortuitous to deliberate (Austin and Seitanidi 2014).

Finding and strengthening the alignment between partners' missions, strategies and values is a precondition of the more advanced stages of collaboration. A good fit can lead to second-order benefits, which exceeds direct monetary benefits to the partners (Gourville and Rangan 2004). Therefore, value co-creation requires "the partners' missions, people, and activities ... to experience collective action and organisational integration" (Austin 2000: 26), potentially leading to changes in organisational culture (Seitanidi 2010). Seitanidi and Crane (2009) concur that the integrative stage can only be achieved following the full implementation of social objectives into business strategy. Likewise, NPOs and their executives need to consciously reposition their organisations from being perceived as needy recipients (Berger et al. 2004) and accede to their role as significant value producers. In doing this, they regain an equal standing that underpins the advanced stages (Salamon 2007; Le Ber and Branzei 2010a). In turn, more equal standing supports the emergence of closer and more involved relationships. Furthermore, Austin (2000) proposes that more intensified co-operation in the advanced stages stimulates the emergence of steadfast

relationships between individuals from the collaboration organisations. This can lead to significant benefits related to reciprocal learning that contributes to organisational learning.

According to Googins et al. (2007), organisational learning represents the most significant benefit of collaboration on the organisational level as it is conducive to innovation and new ways of thinking. Halinen and Tähtinen (2002) further append that strong relational bonds can prevent relationship dissolution or limit the damage related to collaboration ending. Finding ways to converge these inherent sectoral differences offers the driving force of value creation, rather than acting as a barrier (Yaziji 2002, 2004; Berger et al. 2004; Seitanidi 2010).

Overall, in the more advanced stages the benefits progress beyond individual – micro, and organisational – meso benefits, and become outcomes that benefit wider society (Austin 2000; Googins et al. 2007; Glasbergen 2007; Bowen et al. 2010; Seitanidi 2010; Porter and Kramer 2011; Austin and Seitanidi 2014). Bowen et al. (2010) concur that the transformational stage is most progressive form of engagement akin to the integrative stages and accounts for shared benefits created for companies and society alike. The alignment transforms from sole creation to joint (Austin 2000), or co-creation of value (Austin and Seitanidi 2014). The advanced stages cover the integrative “partnership stage” (Austin 2000; Seitanidi and Ryan 2007) or transformational – joint ventures – stage discussed in chapter 2 (Googins et al. 2007; Wymer and Samu 2003). Co-creating value denotes synergy between economic and social objectives that results in creating collaborative value in the form of societal – macro benefits. As noted by Austin (2010), complementary competencies and shared vision can lead to innovative solutions to systemic problems in society and enhance societal welfare.

3.2.2 Collaboration hybrids and value creation

As was discussed in chapter 2, the majority of NPO-business interactions do not fall neatly into specific stages of development (Austin 2000; Googins et al. 2007; Bowen et al. 2010). Hybrid relationships (Austin 2000) are characterised by structural and governance attributes from a cross-section of the developmental stages and most commonly occur in the transactional stage (Austin 2000). It could be argued that this has a significant bearing

on understanding how collaboration creates value for society. These hybrid relationships typically remain in the transactional stage due to the governance imbalance (Seitanidi and Ryan 2007; Seitanidi 2010). However, despite the transactional stage governance nature, involvement in the relationships may be diffused across the organisations and highly integrated working relations may exist. Such deep emotional connections can trigger organisational learning (Austin and Seitanidi 2014). Similarly, the focus may not centre on benefiting society from the outset, yet the organisations may complement key competencies to create innovative solutions. This would suggest a gap in the current understanding of the value of NPO-business collaboration to society. Understanding the capacity of integrative and transformational approaches sets the foundations but many transactional structures transcend the boundaries towards the advanced stages and generate benefits pertaining to the advanced value contributors. These, therefore, carry the potential to also produce value that can lead to societal betterment. How this occurs in practice, however, has escaped focused the academic examination that the thesis undertakes. The next section reviews the current views on value creation in transactional collaboration. It then considers the implications of the different types of transactional relationships on sustainable societal value creation and discusses hybrid transactional relationships as a distinct type with the potential to contribute towards societal betterment.

3.3 Transactional collaboration and societal value creation

The ensuing discussion considers the particulars of value creation in transactional collaboration to examine how it is distinct/similar to other collaborative approaches and how the different approaches to transactional collaboration may influence societal value creation. Austin (2000: 22) describes the factors, dynamic processes and outcomes of the transactional stage as follows: “more active ... and the value flow more significantly two way.” Googins and Rochlin (2000) likewise point to a more reciprocal and interdependent attitude towards creating value. According to Selsky and Parker (2010), transactional collaboration centres around the resource based notion. The organisations come together to exchange and complement resources to achieve greater advantage. The advantage sought is typically primarily self-interested, private gain oriented, and the social aspect is

desirable but secondary to this. Austin and Seitanidi (2012a: 739) concur that transactional collaboration is unlikely to produce value that can contribute to societal betterment but they state that the value creation capacity of the relationship increases compared to philanthropic engagements as it has more complex interactions:

“... resource flow shifts from unilateral to bilateral. There is an explicit exchange of resources and reciprocal value creation... higher resource complementarity... more specialized assets with their greater value generating potential [where] partners have linked interests in that creating value for oneself is dependent on creating it for the other. Associational value is more salient, and organizational compatibility is more essential to value creation. The value creation tends to be more quantifiable and the benefits to the organizations more direct...”

However, transactional collaboration is characterised by a variety of relationship types that differ in the benefits they generate. For example, Lii and Lee (2012) examine the effects of CRM and sponsorship on consumer evaluations of the firm and report, “significantly different influences on [company-consumer] identification and brand attitude” (ibid 2012: 77). Beyond the organisational level benefits, the transactional relationship types differ in relation to their societal value creating capacity.

The majority of sponsorship relationships focus primarily on organisational outcomes and are commercially oriented (Meenaghan 1991; O'Reilly and Madill 2007). The International Chamber of Commerce defines sponsorship as: “any commercial agreement... for the mutual benefit of the sponsor and the sponsored party...” (ICC 2009). For sponsors, benefits relate to branding and sales increases, etc. as part of marketing efforts, with the sponsored entity receiving funding (Cornwell 2008). Recent developments in commercial sponsorship point to considerations of wider societal contributions of commercial sponsorship to comply with the demands to incorporate societal welfare into business operations. For example, Wind-Cowie and Wood (2012) examine the social value of a sports sponsorship between Coca-Cola and the London 2012 Olympic Games and distinguish between four levels of success, to include input, output, outcome and legacy. Legacy corresponds to long-lasting changes, similar to the systemic changes delivered by advanced

stages of the CVC framework (Austin and Seitanidi 2014). However, the social aspect in commercial sponsorship is of peripheral importance.

CRM, on the other hand, has emerged as a transactional relationship type through which profit seeking businesses can engage with social objectives more directly. Businesses associate with a social cause by engaging a NPO whose mission centres on the social cause (Varadarajan and Menon 1988; Lakin and Scheubel 2010). However, instead of integrating social objectives fully into business operations, the programmes are utilised to portray an image of a good corporate citizen (Austin and Seitanidi 2007) and are never philanthropically oriented (Lakin and Scheubel 2010). Although social value is created by the NPO receiving a percentage of sales and increased attention, the motivation rests on commercial benefits to include revenue enhancements (Varadarajan and Menon 1988) and a strategic brand-positioning (Lakin and Scheubel 2010). Little effort is expended on mapping the societal benefit (Rondinelli and London 2003).

According to Seitanidi and Ryan (2007), sponsorship, when traced to its original philanthropic roots, is most closely linked to societal value creation in transactional relationship types. Prior to the commercialisation of sponsorship in the 1990s, the key mode was creating goodwill by building relationships with various stakeholders. Seitanidi and Ryan (2007) suggest that the relational aspect re-emerged with the CSR movement and the increased emphasis on sustainable community relations. This advanced the importance of socio-sponsorship, where social value creation through developing relationships with NPOs as community representatives is the underpinning principle. In contrast to other forms of transactional relationships, the partners unite around a social mission pursued by the NPO. Compensation rewards are desirable, yet secondary. Socio-sponsorship, therefore, differs from the more traditional transactional types. More specifically, if considered in light of the CC Value Drivers of the CVC framework (Austin and Seitanidi 2014), it focuses on societal benefits.

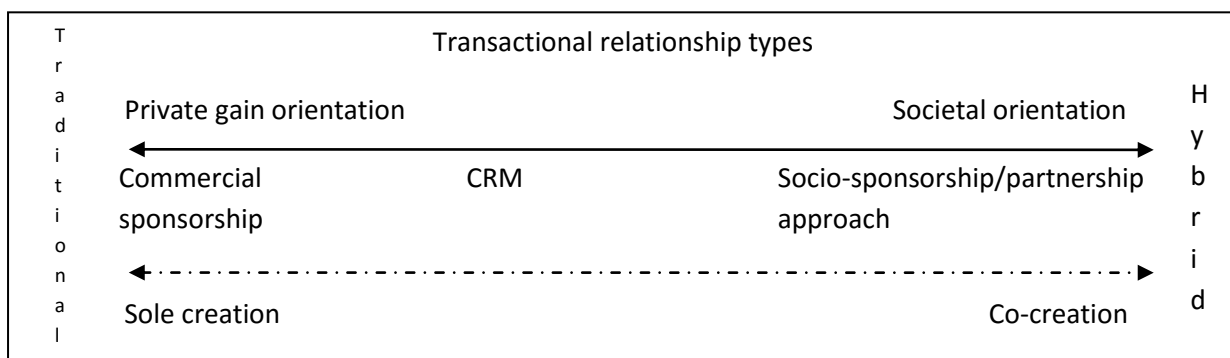
However, socio-sponsorship is typically employed as a firm-centric concept, with little focus given to the NPO perspective. This inhibits the full picture of how the hybrids link with the alignment, engagement and leverage drivers (Austin and Seitanidi 2014). As was discussed in chapter 2, this partnership approach (Seitanidi 2010) resembles socio-sponsorship but its inherent dyadic perspective enables it to incorporate insights into value creation from the perspective of the business and the NPO. The term transactional hybrid is

henceforth used as a way of merging the firm-centric socio-sponsorship (Seitanidi 1999; Seitanidi and Ryan 2007), with the dyadic partnership approach (Seitanidi 2010) and conceptualised as a distinct transactional relationship type.

3.3.1 Societal value orientation continuum in transactional relationships

The above overview of the transactional relationship types suggests that relationships in this stage of CC (Austin 2000) can be plotted along a private gain versus societal oriented continuum. The traditional transactional relationships are commercially oriented and the primary motivator centres on organisational over societal gains. Value creation is, therefore, oriented internally, focusing on creating benefits for the interacting organisations. Economic value primacy characterises this side of the continuum. Any social value is created as a result of the improved operational capability of the funded partner, rather than as a direct result of co-operation. Commercial sponsorship at an extreme end, followed by CRM, defined in chapter 2 to include licensing programmes and joint-issue promotion (Seitanidi and Ryan 2007), occupy this side of the continuum. Hybrid transactional relationships classified previously to include socio-sponsorship (Seitanidi 1999, cited in Seitanidi and Ryan 2007) and/or a partnership approach (Seitanidi 2010) represent the opposing end. Although internal value accrues for both organisations, greater synergies between the organisations lead to socio-economic benefits being generated through co-creation. Figure 3 depicts the continuum.

Figure 3 Continuum of the nature of transactional relationship types



In addition to the above types, Austin and Seitanidi (2012a) further classify employee volunteering as a distinct type of transactional relationships in the CVC framework. In some cases, these programmes develop into distinct and highly structured stand-alone projects “with specific objectives, time frames, and expected exchanges of assets, and paid release time” (bid 2012a: 740). Depending on the organisational intent, employee volunteering can be strategically oriented or societally oriented. Strategic orientation refers to initiatives linked to human resource training and development, with social objectives assumed rather than intended. Employee volunteering, for example, typically forms part of different NPO-business interactions types that are motivated by CSR. The time provided by the employees, both for profit and nonprofit, is considered an in-kind resource, provided as part of resource complementarity (Peloza et al. 2009). Organisational benefits flow as part of compensation rewards for both partners. Peloza et al. (2009) see employee volunteering as a way of enhancing benefits from what the authors label corporate philanthropy (the lack of altruistic motives discussed in the study indicates transactional, as opposed to philanthropic concept).













Yaziji (2004) sees the greater interactions amongst employees as a way of learning about important social forces and upcoming societal trends that can impact business in terms of new legislation or industry standards. The NPOs on the other hand gain volunteer capital and benefit from various opportunities for learning (Austin 2000; Googins and Rochlin 2000; Yaziji and Doh 2009; Seitanidi 2010; Vock et al. 2011). The thesis builds on these studies and considers volunteering as a feature of the hybrid transactional relationships.












3.3.2 Hybrid transactional relationships and societal value creation

The dyadic perspective enables a more comprehensive examining of the value creating capacity of this type of transactional relationships in light of the CC Value Drivers framework (Austin and Seitanidi 2014). In addition to the societal benefits discussed above, employee volunteering increases the number of individuals throughout the organisations involved in the relationship. This feature progresses the involvement value contributor as part of the engagement driver from managers at the top of the organisations, to engaging

individuals across the organisational hierarchies (Austin and Seitanidi 2014). The greater organisational diffusion also advances the emotional connection and trust towards more advanced stages. Similarly, a number of the leverage drivers evolve as larger and more complex resources are invested. The greater interconnectivity introduces partners to each other's capabilities that can induce greater synergies and it is conducive to increasing mutual learning. Figure 4 depicts the position of these types of hybrids on the CC Value Drivers (Austin and Seitanidi 2014).

Figure 4: Position of hybrid transactional relationships on CC Value Drivers.

Nature of relationship	Stage 1 Philanthropic	Stage 2 Transactional	Stage 3 Integrative	Stage 4 Transformational
ALIGNMENT DRIVER				
Mission relevance <i>Peripheral – Central</i>				
Strategic importance <i>Insignificant – Vital</i>				
Values connection <i>Shallow – Deep</i>				
Problem knowledge <i>Unbalanced – Synchronous</i>				
Value creation frames <i>Disparate – Fused</i>				
Benefit focus <i>Partners – Society</i>				
ENGAGEMENT DRIVER				
Emotional connections <i>Light – Profound</i>				
Interaction focus <i>Procedural – Substantive</i>				
Involvement <i>Few – Top to bottom</i>				
Frequency <i>Occasional – Intensive</i>				
Trust <i>Modest – Deep</i>				
Active scope <i>Narrow – Broad</i>				

Structure <i>Dyad – Multiparty</i>			
Managerial complexity <i>Simple – Complex</i>			
LEVERAGE DRIVER			
Resource magnitude <i>Small – Big</i>			
Resource type <i>Money – Core competencies</i>			
Resource link <i>Separate – Conjoined</i>			
Synergism <i>Weak – Predominant</i>			
Learning <i>Low – Continual</i>			
Innovation <i>Seldom – Always</i>			
Internal change <i>Minimal – Great</i>			
Systemic change <i>Rare – Common</i>			
POWER STRUCTURE			
Business-Balanced			

Transactional hybrids indicate the potential to generate benefits that represent outcomes expectations of different stages of the CC. Associational and transferred value as the most basic types of value potential form the basis of the benefits. However, the increased interaction and involvement, and greater resource magnitude, type and links enable for interaction value and to some extent, may trigger synergistic value type benefits to emerge (Austin and Seitanidi 2014). Moreover, the societal benefit orientation points to creating social value directly through co-operation as an organising principle. This points to the possibility to create/co-create benefits internally and externally, at all three levels of value creation: individual – micro, organisational - meso and societal – macro level (Turban and Greening 1997; Selsky and Parker 2005; Aguilera et al. 2007; Pelozo et al. 2009; Kolk et al. 2010; Austin and Seitanidi 2012b; Wind-Cowie and Wood 2012). For example, on the

individual level, the engaged employees gain practical and psychological benefits from gaining new skills/perspectives and psychic satisfaction from helping and socialising (Bhattacharya et al. 2009; Austin and Seitanidi 2014). On the organisational level, it improves organisational citizenship and employee performance (Turban and Greening 1997; Googins and Rochlin 2000; Pelozo et al. 2009; Kolk et al. 2010). On the societal level, the benefits created from the actual initiative may be captured by individual beneficiaries of the social cause or it may improve the work of the related NPO or community (Austin 2000; Nelson and Zadek 2000; Pelozo and Falkenberg 2009). According to Seitanidi (2010), although unplanned and less likely than in social partnerships and joint ventures, societal value capable of inducing systemic changes may emerge. How this occurs, under what circumstances and in what contexts is however little known.

The lack of understanding of the social function of transactional collaboration appears to relate to the predominant organisation-centric standpoint through which it has been researched. Le Ber and Branzei (2010) suggest that the organisational perspective in prior research, in particular that related to the business partner, results in a body of knowledge constructed from a very narrow focus. It assumes that the benefits produced are a result of the structural characteristics and value offering of the interacting organisations as they progress along the collaboration continuum (Austin and Seitanidi 2014). It fails to account for the influence of individuals involved in the processes related to collaboration, despite the widespread acknowledgements that individuals essentially determine the worth of any value creation activity (Vargo et al. 2008; Bhattacharya et al. 2009). As suggested by Le Ber and Branzei (2010), individual beneficiary standpoint needs to be made more explicit in cross-sector collaboration in order to re-socialise it. The next section will discuss the need to integrate individual beneficiary standpoint and will examine the individual level perspective in relation to value creation in collaboration.

3.3.3 Integrating individual-centric perspectives

During the course of this account, the discussion has largely focused on the organisation-centric perspective of collaborative value creation as the dominant approach in extant literature. However, this perspective has so far struggled to provide a holistic

understanding of how collaboration creates societal value. The overemphasis to derive organisational benefits to justify collaboration has resulted in a body of literature with an underdeveloped understanding of the micro level of value creation through NPO-business collaboration. According to Austin and Seitanidi (2012b: 952-953), “the effects of initiatives on individuals or the role of individuals in affecting value creation require further analysis”. Kolk et al. (2010: 126-127) further suggest that in order to expose whether relationships are effective in contributing to organisational benefits and to social good “we need to delve into the micro level of cross-sector interactions”. A small but growing stream in the field indicates that understanding how collaboration benefits organisations and society starts with uncovering the individual beneficiary’s attitude to it (Drumwright 1994, 1996; Hemingway and MacLagan 2004; Hemingway 2005; Waddock 2008; Bhattacharya et al. 2009; Le Ber and Branzei 2010a; Kolk et al. 2010; Daellenbach et al. 2013). This subsection examines the potential influence of individuals within collaboration arrangements. It first considers individuals employed within the collaborating organisations, and then considers the target beneficiaries of NPOs.

It is argued here that, on the organisational level, the underdeveloped micro level knowledge relates to the lack of consideration for the underpinning principles of organisations and their value offerings. According to Mintzberg (2009), organisations in any sector are communities of individuals. Organisational value frames include the preferences of its individuals, both executives (Hemingway and MacLagan 2004; Ellson 2004; Maon, Lindgreen and Swaen 2008), and those operating at different organisational levels motivated by personal conviction (Drumwright 1994, 1996; Hemingway 2005; Berger et al. 2006). Schwartz, Melech et al. (2001: 521) propose that values, as “guiding principles in people’s lives” can provide an understanding of the attitudes, motivations and the behaviour of individuals and also shed light on the functioning of organisations and societies (Schwartz et al. 2001, p. 521). According to Schwartz and Bilsky (1987: 551), two broad categories of personal values underpin behaviour. Others’ oriented values exhibit tendencies of a high degree of concern for others, driven by the sense of responsibility, being respectful, social justice, reciprocity, etc. In contrast, self-interested values denote more individualistic characteristics motivated primarily by social power, ambition, pleasure, independence, etc. (Schwartz and Bilsky 1987).

The traditionally distinct value propositions of businesses and NPOs are characterised by a perceived incommensurability between economic and self-interested values and those of social welfare and collectivism. Austin et al. (2006: 253) posit that the creation of economic value centres on creating tangible private wealth whereas social value focuses on “bettering people’s lives through the pursuit of socially desirable outcomes”. Since organisational identification theory suggests that people tend to work for organisations with a close match to their personal values (Sen and Bhattacharya 2001), it would suggest very little overlap between the private and nonprofit sectors. However, as was discussed in section 2.2 the sectors have been undergoing a crossing over of the divergent value frames (Nelson and Zadek 2000; Selsky and Parker 2005; Zadek 2008).

Literature suggests that individual influence is one of the key drivers. As proposed by Waddock (2008), a growing number of ‘change agents’ operate in both sectors. Business leaders are increasingly seen heading NPOs, providing the nonprofit sector with business acumen urgently needed in an era of funding constraints, and ‘social entrepreneurs’ operate within the private sector, helping to drive the social agenda (Drumwright 1994; Hemingway 2005; Berger et al. 2006). Individuals with strongly held personal conviction persistently work towards reconciling their work environment with their deeply held social values by driving initiatives that will move them closer to equilibrium (Drumwright 1994; Hemingway and Maclagan 2004; Hemingway 2005; Berger et al. 2006; Ryan and Blois 2010; Daellenbach et al. 2013).

Indeed, the role of influential individuals in business has long been acknowledged as a driver of relationships with NPOs (e.g. Berger 1994; Austin 2000; Hemingway 2005; Waddock 2008; Knight 2010; Daellenbach et al. 2013). Brammer and Millington (2005) find managerial discretion driven by personal agendas as a significant influencing factor in corporate support. Austin (2000) suggests that the personal values of business executives form the initial impetus behind collaboration. As commented by Daellenbach et al. 2013: 86), the personal preferences of executives remain “present underneath a layer of what might be thought of as more commercial rationale” (Daellenbach et al. 2013). Hemingway (2005: 238) further suggests that socially driven behaviours occur throughout organisational hierarchies, rather than being “confined to management”. As commented by Austin (2000: 124), for collaboration to be successful, “the organizations, not just the leaders, must own the alliance”. Similarly, the shift from safeguarding the ‘sacred world of art’ from external

influences towards business collaboration means that the administrator's personal values must align with this notion (Hobday 2002; Weinstein 2010).

However, the implicit claim in NPO-business collaboration is the delivery of social good beyond the organisational boundary (Seitanidi and Lindgreen 2010; Austin 2010). The role of the target beneficiary of the social cause addressed, therefore, requires examination (Le Ber and Branzei 2010a). In transactional collaboration, the target beneficiaries are the customers served through the NPO's mission. Extant studies consider these target beneficiaries as passive consumers served by the collaborating organisations (Austin et al. 2006; Austin and Seitanidi 2014). As stated by Austin and Seitanidi (2012: 952), collaborating organisations "create social value for individuals – targeted beneficiaries with needs that are attended to by the collaborative action". However, wider management literature indicates a contrasting role of target beneficiaries. For example, Coff (1999) suggests that beneficiaries' volition to contribute to the process of value creation significantly influences the outcome. Beneficiaries can withhold capabilities or build them, and so significantly mediate value creation. As proposed by Le Ber and Branzei (2010a: 603) beneficiaries "can and often do contribute to value creation processes" yet their input may fluctuate with context. In relational contexts such as the arts and health related issues, which will be discussed in subsequent sections, beneficiaries must participate in the value creation process for value to emerge. This requires a detailed understanding of value creation at the micro level and of the micro-processes through which the micro level value transfers across other levels. An individual perspective allows a detailed examination of the micro level which is crucial to gain a holistic perspective of the value of this collaboration for society. The thesis utilises this approach.

Unravelling the causal links through which the individual benefits transfer to other levels to stimulate societal value creation is a complex task requiring the understanding of the different types of value, stages of development including the distinct relationship types, and the related processes and level and location of outcomes (Austin and Seitanidi 2012a). Before examining how these links emerge in practice and how they stimulate sustainable societal value creation, the thesis will preview the multilevel benefits reported in literature and how the transfer mechanism may work within and across the levels.

3.4 Levels of value creation

The integration of social and economic orientation as part of the collaborative turn discussed previously indicates a distinctive potential to create wide-ranging benefits based on shared value creation for both economic and social returns (Porter and Kramer 2006, 2011). The benefits can accrue to individuals, organisations and society, indicating three distinct levels of analysis: micro, meso and macro level. This essentially indicates who benefits from collaboration (Austin and Seitanidi 2014). Austin and Seitanidi (2014) further distinguish between whether the levels represent internal or external location in relation to the collaborative action. Integrating the beneficiary standpoint further helps to determine where the benefits originate and how, as well as providing indications as to the micro-processes through which societal value may emerge. The next section looks at value creation and its benefits according to the different levels of analysis and their specific location. Since how individuals benefit from collaboration represents the starting point for understanding all subsequent levels (Bhattacharya et al. 2009; Waddock 2010; Le Ber and Branzei 2010; Kolk et al. 2010), the following section starts by previewing the current understanding relating to micro level benefits and the micro processes through which they may transfer within and across levels, followed by the meso level and macro level. Each subsection further distinguishes between internal and external locations (Austin and Seitanidi 2012b).

3.4.1 Micro level benefits

Individuals can benefit from collaboration in two forms: functional and emotional (Bhattacharya, Du and Sen 2005; Bhattacharya et al 2009). The functional benefits relate to the employees gaining new skills, abilities and an improved understanding of the sectoral differences through broadened horizons. The emotional gains link with the psychic satisfaction of helping others and/or society, and improved interpersonal relations (c.f. Austin and Seitanidi 2012b). The individual level benefits are typically examined as impacts of socially oriented initiatives on individual stakeholder groups (c.f. Kolk et al. 2010; Pelozo and Shang 2011). Internal individuals include: employees within the collaborating

organisations (Turban and Greening 2000; Smith 2003; Bosse, Phillips and Harrison 2009; Bhattacharya, Sen and Korschun 2008; Peloza, Hudson and Hassay 2009; Gond, El-Akreimi, Igalens and Swaen 2010), which includes the senior managers (O'Hagan and Harvey 2000; Kolk et al. 2010; Daellenbach et al. 2013). For example, from the business standpoint, Bhattacharya et al. (2008) report that employees benefit from self-enhancement and personal growth when engaging in social initiatives.

These initiatives also improve work and personal life balance in cases where initiatives take place in employees' own social communities. The functional benefits relate to skills development, and the connections that social initiatives can create between employees at different locations and between employees and the organisation, etc. (Bhattacharya et al. 2008).

In addition to the business perspective, extant studies provide some indicators of benefits for the NPO employees in terms of skills, expertise and broadened perspectives on the practical side, and friendship development on the emotional side (c.f. Kolk et al. 2010; Austin and Seitanidi 2012b). However, these indicators are derived largely as a by-product of studies adopting the business perspective (e.g. Austin 2000) or from more general strategic alliance management studies (e.g. Muthusamy and White 2005). Some exceptions include a study by Berger et al. (2006) that examines the meanings of social alliances for the people involved in their instigation and management from a dyadic perspective; and Seitanidi 's (2010) findings of "missed opportunities" of the NPO's employees.

However, a number of scholars have commented on the lack of analysis of micro level benefits beyond the direct organisational members (Bhattacharya and Sen 2004; Bhattacharya et al. 2009; Peloza and Shang 2011). Individuals external to the collaborative action, according to Austin and Seitanidi (2014), include the business customers, investors and the intended beneficiaries of the collaboration. The effects of social initiatives on the attitudes of customers of the business partner (Smith 2001; Sen and Bhattacharya 2001, Bhattacharya and Sen 2004; Bhattacharya et al. 2009; Vock et al. 2011; Lii and Lee 2012) and investors (Sen, Bhattacharya and Korschun 2006; Elliott, Jackson, Peecher and White 2012) have received some attention. Kolk et al. (2010) further suggest that employees' attitudes, whether positive or negative, can transfer onto customers and trigger similar responses in them. The positive emotional gains can motivate employees towards improved

performance and productivity (Turban and Greening 1997, Bhattacharya et al. 2008, 2009; Gond et al. 2010), which indirectly benefits both customers (Vock et al. 2011) and investors (Sen et al. 2006).

A more comprehensive understanding of the micro level benefits is required since the individual benefits are posited as the underpinning element of value creation (Bhattacharya et al. 2009; Waddock 2008). Particularly deficient is knowledge related to the NPOs' beneficiary benefits. Some insights can be derived from studies that have provided indicators related to enhancing "communities" at large (e.g. Austin 2000; Moir 2004; Seitanidi 2010; Lim 2010). A study by Bhattacharya, Du and Sen (2005) which examines a corporate social marketing "Crest Healthy Smile 2010" programme provides early indicators of beneficiary benefits. A multi-disciplinary perspective reconnects the organisation-centric standpoint with social issues studies presents an instructive starting point particularly in terms of informing target beneficiary micro level benefits. As mentioned above, the view that positions target beneficiaries as external to collaborative action (Austin and Seitanidi 2014) is contentious due to the varying degree of input required from beneficiaries in creating value under different circumstances (Coff 1999; Le Ber and Branzei 2010a). An integrated perspective is likely to contribute elements of value creation that have so far escaped academic theorising and one of the objectives of the thesis is to bridge this gap.

3.4.1.1 Individual to stakeholder group benefits

Vock et al. (2011) state that managers' understanding of the significance of diverse individual stakeholders' perceptions can also inform the cross-stakeholder groups' interaction processes. Initial theorising by Kolk et al. (2010) suggests causal links within and between the levels of analysis through a variety of 'trickle effects'. They define trickle effects as a "diffusion mechanism" through which the effects of collaboration can transfer from one level to another (ibid 2010: 124-125). Kolk et al. (2010: 127) theorise that the trickle effects that transmit the effects of collaboration occur "*between* employees of the organizations involved, *between* employees *within* organizations, and *between* employees and consumers" (Kolk et al. 2010: 127, emphasis in original). Similarly, Drumwright (1996: 81) previously reported that employees with high levels of involvement in a particular social

cause that forms part of their company's social initiatives engage in "evangelizing" for the company's support of the cause amongst their respective subgroups within both internal and external constituents.

Sen and Bhattacharya (2001) find a link between social initiative and consumers' general sense of wellbeing. Although this may not translate into buying behaviour, consumers' willingness to engage in positive conversations within their respective groups regarding a socially responsible company is reported as a key outcome of social initiative. Vock et al. (2011) demonstrate explicitly the links between employee derived benefits and consumer benefits from NPO-business relationships. The authors argue that employees' active participation in such relationships generates personal benefits. This in turn may affect consumers, as they believe that the employee is serving their needs effectively. If the consumer perceives the employee's participation as beneficial to their self-interest, the consumer will reciprocate favourably towards the firm and vice versa.

These studies utilise, whether implied or explicit in the study design, underpinning theoretical mechanisms such as social exchange theory (Aguilera, Rupp, Ganapathi and Williams 2006; Di Domenico et al. 2009; Gond et al. 2010), social identity theory (Greening and Turban 2000; Brammer et al. 2007), organisational identification theory (Berger, Cunningham and Drumwright 2006; Gond et al. 2010), organisational justice theory (Bosse et al. 2009), competitive advantage and resource based view theory (Maignan and Ferrell 2001). Also utilised are the links between means-end chain and attribution theories (Bhattacharya et al. 2008; Bhattacharya et al. 2009), and signalling and self-interest theories (Vock et al. 2011), etc. Berger et al. (2006: 128) find the existence of social alliances bestows employees "a greater sense of being whole, integrated persons" that in turn contributes to closer identification with the organisation. Brammer et al. (2007) confirm that procedural justice and training provision, termed internal CSR, contribute significantly to organisational commitment (OC). The same positive association applies to external CSR and OC which can also relate to job satisfaction. The study further indicates that CSR generates benefits beyond external reputation and external stakeholder management, to include internal stakeholder relations.

However, literature related to the transmission of the effects reflects the limited understanding of the micro level benefits as discussed above. The main focus is on the effects of value creation and co-creation from the firm's standpoint. Little is known about

how value emerges, transfers across levels, and what effect it has beyond the boundaries of the business case, particularly beyond the meso level benefits. This is despite indications that micro level interactions may occur across a range of internal and external stakeholder groups (Seitanidi 2008; Kolk et al. 2010). Beneficiaries, NPO employees and other significant stakeholders, such as media, legislators, other NPOs, etc. need to be considered (Bhattacharya and Korschun 2008).

Wolfe and Putler (2002) state that when self-interest is not a primary motivator for actions, stakeholder group boundaries tend to blur into interconnected networks of relationships. These include, for example, reciprocal deeds where individuals may reciprocate positive experience by positive advocacy (Drumwright 1996; Bhattacharya and Korschun 2008). Wolfe and Putler state that “subgroups within different role-based stakeholder groups might have more similar priorities than either subgroup has with others within their role-based stakeholder group” (ibid 2002: 64). Information relevant to the subgroup’s salient interest is shared amongst the relevant actors and trickle around effects may occur. Empirical research offers some support for this logic in that it explicates the implications of such subgroups to social initiative. Drumwright (1996) accounts affinity for the cause among key constituents to include employees, customers, channel partners, vendors and consumers at large, as a precursor for successful campaigns with social objectives. Similarly, Sen and Bhattacharya (2001) report that consumer identification with a specific social issue significantly influences the reactions to the company’s effort in the social sphere.

A holistic understanding of the micro level benefits, how they emerge and how the interaction processes contribute to societal value creation will require a balanced perspective of a broad range of micro level stakeholders (Frow and Payne 2011). The gap in terms of micro level benefits amongst constituents beyond the business case (c. f. Peloza and Shang 2009), together with the limited understanding of the respective trickle effects, obscures the full picture. Current knowledge needs to a) be deepened by how NPO employees benefit, and b) develop a comprehensive understanding using both theoretical and applied research of how the benefits at the NPO’s beneficiaries level are generated, as well as how this effects further value creation (Le Ber and Branzei 2010). Therefore, this gap in requires a focused examination that thesis will aim to provide.

The proposition of Kolk et al. (2010) that micro level interactions provide the basis for understanding subsequent value creation on a meso level, as well as macro level, is examined here as follows. Research that utilises factors such as “value slippage” (Lepak et al. 2007: 181), norms of reciprocity (Homans 1961; Molm, Collett and Schaefer 2007), social exchange (Blau 1964) social contagion (c.f. Kolk et al. 2010: 130) and identity appears instructive to explaining social phenomena where people are more likely to identify with an organisation when they perceive its identity to be enduring, distinctive and capable of enhancing their self-esteem (Sen and Bhattacharya 2001). Again, it is primarily informed by the firm-centric standpoint, but refers to social realities involving people and so the findings may offer useful guidelines beyond the firm context. However, prior to examining whether and how such trickle effects induce societal value, the benefits that collaborations generate for the partnering organisations will be previewed. Benefits accrued to the partnering organisations form the meso level of the collaboration value outcomes and will be previewed next (Austin and Seitanidi 2014).

3.4.2 Meso level benefits

Individual benefits denote the underpinning principles of all value creation in collaboration (Bhattacharya et al. 2009; Kolk et al. 2010). However, it is the organisational level benefits that enhance the performance of the collaborating organisations, particularly the business partner, which has witnessed the most focused academic attention. There are many key performance indicators of the business benefits and the next section provides an overview as reported in extant literature.

3.4.2.1 *Business benefits*

Business benefits are the building blocks of the business case for social initiatives. Although this research stream is the most prolific area of research examining business and society relations, it is also the most contested one. In addition to the previously discussed debates regarding business involvement in social issues and the CSR-CFP link, business benefits occur in two forms: tangible or monetary, and intangible/ nonmonetary (Steger, Ionescu-Somers, and Salzmänn 2007; Seitanidi and Ryan 2007). The assessment is complex

and the effect on the company's bottom line is difficult to establish. Steger et al. (2007) examine business benefits related to companies' environmental and social initiatives. Along with revenue increases and cost reduction benefits as the monetary benefits, the authors identify: improved risk management, better licence to operate, enhanced value and reputation, and better attraction and retention of talent, as the dominant economic logic for corporate sustainability. The latter, non-monetary concepts however are " 'soft', complex and intangible" (ibid 2007: 172; emphasis in original) and, if compared to the relative ease of tracking cost reductions, more challenging in terms of isolating their contribution.

Contribution to the economic performance occurs, if at all, with a time delay as it needs to be leveraged into higher cash flows. Moreover, the different approaches to social initiatives are likely to result in different sets of benefits. For example, business employees creating a community garden would likely generate different forms of goodwill, yet benefits linked to image transfer from the NPO's brand are unlikely to occur. Pertinent research reports that business benefits related to collaborations with NPOs can result in improved financial performance, a reduction in costs and strengthened business sustainability through enhancing the company brand, image and reputation, improved internal and external stakeholder relations, various forms of innovation, market expansion and networking, etc. (e.g. Varadarajan and Menon 1988; Rondinelli and London 2003; Waddell 2000; Austin 2000; Moir 2004; McNicholas 2004; Pelozo and Falkenberg 2009; Seitanidi 2010; Kolk et al. 2010; etc.)

Social initiatives can be administered by a company without any external help (Di Domenico et al. 2009). However, as was discussed in the previous chapters, many businesses opt to form a relationship with a specific NPO that represents the cause the company wishes to engage in (Waddock 1988; Austin 2000; Googins and Rochlin 2000; Selsky and Parker 2005; Seitanidi 2010; Austin and Seitanidi 2014). Collaborative arrangements need to generate benefits for both partners (Austin 2000). Di Domenico et al. (2009) argue that tensions related to inequality may result in a relationship dissonance that leads to collapse. The more equal the benefits accrual, the more likely the relationship is to continue in a long-term capacity (Farrelly and Quester 2005; Di Domenico et al. 2009) and result in sustainable change that is both organisational and social (Di Domenico et al. 2009;

Le Ber and Branzei 2010b; Seitanidi 2010). Meso level benefits for the participating NPOs reported in extant literature are examined next.

3.4.2.2 NPO benefits

As discussed above, extant literature focuses predominately on examining business benefits. Nelson and Zadek (2000), however, highlight eight participant benefits that can be constructive to both business and NPO constituents to include: development of human capital, improved operational efficiency, organisational innovation, increased access to resources, better access to information, more effective products and services, enhanced reputation, and creation of a stable society. Austin and Seitanidi (2012b) usefully provide an overview of NPO benefits reported in extant literature by organising them according to the associational, transferred, interactional and synergistic value types derived from the CVC framework. The benefits range from financial benefits and the development of skills, capabilities and expertise, to an increase in public awareness of the particular NPO's mission, increased visibility and access to networks, as well as innovation, organisational change and improve standing in society, etc. However, Al-Tabbaa et al. (2012) argue that much knowledge related to NPOs is derived from studies that focus solely on the business perspective that essentially withholds the voice of the NPO and this bears negatively on developing a balanced view of value creation in collaboration (Le Ber and Branzei 2010). Despite this, some scholars have developed study designs that incorporate the NPO voices and this is presented in the next subsection.

3.4.2.3 Dyadic perspective of meso level benefits

Gourville and Rangan (2004) employ a dyadic perspective in examining meso level benefits in cause-related collaborations. The authors incorporate a time dimension to value creation by classifying outcomes into "first order" and "second order" benefits, depending on the propinquity of contribution to higher cash flows. First order benefits are monetary increases to the partners through donations for the NPOs and sales increases for the business. Second order benefits include more supportive and loyal employees and investors

for the business partner, and increases in reach and effectiveness of the cause for the NPO (ibid 2003: 44). Different sets of first, second, and combined first and second order benefits result from different forms of cause-related campaigns based on the fit between business strategy and NPO mission.

Seitanidi (2010), however, contends that the proliferation of the success factors in the form of benefits produced does not substantiate the implications for value creation. She examines the meso level outcomes using social partnerships as the unit of analysis. In contrast to Gourville and Rangan (2004), Seitanidi utilises the level and content of change to analyse partnership outcomes and explicates the linkages between benefits and value creation. Anticipated – content outcomes include financial support for the NPO and employee engagement for the business. Unintentional – processual benefits accrue in the form of an NPO's capacity improvements and networking opportunities, and its trust for businesses. Using anticipated and unanticipated outcomes on the organisational level, the study further distinguishes between organisational 'genesis' and 'kinesis'. Genesis is distinct by "a substantial change in the core of the organisation" as a purveyor of "deep level of change", as opposed to organisational 'kinesis' seen as peripheral, process or outcome changes (ibid 2010: 130-131). As a result of the multitude of benefits, the organisation's performance improves. For the NPO, this relates to an improved ability to fulfil the social mission. For the business partner, it can provide more stable corporate sustainability, both financial and social¹.

Seitanidi (2010) further reports that social outcomes and societal outcomes emerge as an external result of collaboration. Since the central proposition of NPO-business collaboration is to create socio-economic benefits for society, not just for the collaborating organisations and their constituents (Austin 2000; Glasbergen 2007), the following section previews literature related to societal, macro level benefits.

3.4.3 Macro level benefits

Kolk et al. (2010) state that collaboration is typically studied from the macro and meso level perspectives. However, Austin and Seitanidi (2014) observe a dearth of research

¹ See appendix 1 for summaries of meso level benefits studies previewed

that examines macro level value creation. Rochlin and Christoffer (2000: 12) articulated the issue more than a decade ago: “many studies fail to ask the critical question of whether [collaboration] creates sustainable benefits for the communities and stakeholders”. A healthy, well-functioning and sustainable society is both an outcome and the foundation of successful private, nonprofit and public sectors due to the virtuous circle effects (Waddock and Graves 1997; Austin 2012, conference discussion). The purported aim of NPO-business collaboration, therefore, is to generate macro level value (Austin 2000; Selsky and Parker 2005; Glasbergen 2007; Austin and Seitanidi 2014). Macro level benefits are produced externally to the collaborative action and emerge in the form of benefits for individuals and other organisations, or as systemic changes in the societal make-up (Austin and Seitanidi 2014). Sustainable macro level value creation denotes societal betterment. Nelson and Zadek (2000) outline a number of tangible and intangible macro level outcomes that include local economic development, job creation and overall improvement in quality of life, etc.² The effect on individuals can be direct or indirect. The trickle effects between employees and customers reported by Vock et al. (2011) denote indirect effect. Customers benefit indirectly from the benefits acquired by employees from collaboration.

Direct individual benefits on the macro level relate to the positive effects of collaboration through innovations that produce systemic policy change such as the national service ethics and enabling legislation championed by Timberland and City Year (Austin 2000). Producing direct macro level value determines the ability of collaboration to effect societal betterment. However, how and under what conditions can transactional collaboration achieve it shows a gap in literature. Questions related to the micro-processes through which value created internally to the collaboration can effect direct macro, societal value creation, what conditions societal value creation through transactional relationships and what contextual factors are at play appears to have escaped research focus. The following sections will look at these deficiencies in literature in more detail and discuss potential approaches for overcoming them.

² See appendix 2 for summaries of further macro level benefits studies previewed

3.5 Transactional collaboration and societal betterment: Knowledge gaps

The discussion outlined in the literature review above presents a number of gaps in current knowledge related to the societal value creation through transactional collaboration. The initial gap related to the different transactional approaches was proposed in chapter 2 and the lack of beneficiary perspective was parenthetically introduced in section 3.3.1 above. These oversights in research which the thesis aims to address through adopting a processual outcomes perspective, a portfolio perspective and a contextual setting perspective will be evaluated next.

Glasbergen (2007) posits that the principal criticisms of cross-sector collaboration as a vehicle for societal betterment embodied in macro level value focus on the lack of clarity regarding the longer-term sustainability of the social value created. Extant studies typically report the macro level benefits simply as part of the findings of collaboration studies and in the form of anecdotal evidence. Despite classifying benefits as organisational and social (e.g. Varadarajan and Menon 1988; Scheff and Kotler 1996; Waddell 2000; Rondinelli and London 2003; Gourville and Rangan 2004) or organisational and societal (e.g. Austin 2000; Moir 2004; Moir and Taffler 2004; Lim 2010), the focus centres on a detailed examination of the organisational outcomes. This imbalance results in a diminished understanding of the holistic effect of collaboration on society, although societal betterment is the underpinning principle of NPO-business collaboration (Austin 2010; Austin and Seitanidi 2014). The next subsection considers the processual outcomes perspective.

3.5.1 Societal betterment and transactional hybrids: A processual outcomes perspective

A number of authors have pointed to an overemphasis on describing societal outcomes instead of examining the processes through which they emerge (Roppo and Sauer 2003; Seitanidi and Ryan 2007; Kolk et al. 2010; Le Ber and Branzei 2010; Austin and Seitanidi 2014). The current study, therefore, considers adopting a processual outcomes perspective to the examination of how transactional collaboration can create societal value as an instructive approach through which to advance knowledge in the field. Roppo and Sauer (2003) find that research typically only outlines the attributes and indicators of

success. The process through which collaboration outcomes emerge and evolve and the factors that mediate it, such as time, context, and key individuals and groups are underspecified. Seitanidi and Ryan (2007: 256) highlight the importance of process-based interactions in analysing organisational benefits: “organisational benefits not only stem from the outcomes of the interaction but also from the process of interaction” such as organisational learning and other intangibles.

Seitanidi (2008) argues that focusing on the processes of interaction across levels of analysis enables a more holistic view of value creation through collaboration. It supplements the input-output models typically utilised in analyses with multilevel and nonlinear interactions that underpin the embedded set of collaborative arrangements. Since this hypothesis considers interactions across all levels, both internally and between the internal and external locations, it progresses the research agenda beyond the organisational benefits. For example, a business employee engaged in volunteering interacts with their own colleagues and the NPO employees, i.e. within the collaboration. The employee will also engage in interactions in the external context. Whether directly related to the social cause, or the impacts of the internal interactions, these may induce an external effect (Knight 2010).

Although specifically focusing on micro level value creation, Kolk et al. (2010) likewise theorise that the impact of interactions in the nested multiple levels can transmit within and across levels of analysis. Vock et al. (2011) have begun to demonstrate how these trickle effects occur within the micro level and how they can create an effect on the meso level. However, the implications of these micro processes for societal betterment remain underexplored (Austin and Seitanidi 2014). Although the conceptual explorations (Seitanidi 2008; Kolk et al. 2010) and the initial empirical findings (Vock et al. 2011) “herald a new research domain” of interactions as a level of analysis (Austin and Seitanidi 2012b: 952), applied understanding of how the ‘complex causality’ (Seitanidi 2008) translates to societal betterment shows a gap in literature. The thesis aims to provide insights into how value created on the individual level within the collaboration can affect societal value creation by examining how and whether the different kinds of benefits produced through collaboration can transmit across the levels. The aim is to provide a detailed account of the interaction processes through which value for society is generated in transactional collaboration. Beyond the focus on the value modality, the structural deficiencies in

transactional collaboration to directly affect societal betterment suggest specific factors that enable societal value creation. The adoption of a portfolio perspective as a potential factor is discussed next.

3.5.2 Societal betterment and transactional hybrids: A portfolio perspective

This section considers the adoption of a portfolio perspective as a way of creating societal value through transactional collaboration. The prior discussions indicate that extant literature considers that the structural and governance characteristics of single transactional relationships are unable to directly induce societal betterment (Seitanidi 2010; Bowen et al. 2010; Austin and Seitanidi 2014). However, this perspective is largely informed by examining societal value creation aptitude through a dyadic perspective, which predominates in literature (c.f. Bendell 2000; Warner and Sullivan 2004; Di Domenico et al. 2009; Austin and Seitanidi 2014). From this perspective, the internal contextual factors, such as the underdeveloped organisational learning or relatively short term visioning, may stymie creation of societal value.

Yet, collaboration dyads are not atomistic phenomena operating in a vacuum. Each organisation is embedded in a wider network of relationships which impacts their actions (Moller and Halinen 1999). Beside the relationship specific characteristics, various contextual/network factors may influence the emergence of societal value. Network theory is not a new subject in interorganisational collaboration (c.f. Reid et al. 2001). However, it has largely been applied in terms of the organisation's ability to engage in effective collaboration (c.f. Di Domenico et al. 2009; Ryan and Fahy 2012) rather than how the network relations may enable/constrain value creation. The following discussion considers some factors found in current literature that may provide initial insights.

The implied strength of transformational relationships in inducing systemic changes rests on multiple actors across societal sectors joining forces and creating a network through which value is created (Googins et al. 2007; Austin and Seitanidi 2014). Multiparty collaboration can and does however also occur in less advanced relationships. Austin (2000) previously reported that additional partners from across sectors often join successful dyadic relationships upon the realisation that more partners can lead to additional leverage for

social value to emerge. Ryan and Fahy (2012) suggest that sponsorship has actually evolved to a stage where a network perspective is required in addition to the traditional dyadic lens. The value of sponsorship to an organisation cannot be calculated by isolating individual dyadic relationships. The interconnected nature of the different relationships and the compounded impact on the organisation's image needs to be considered (Cornwell 2008; Chien et al. 2011; Ryan and Fahy 2012). Chien et al. (2011) recognise that organisations can concurrently manage a range of relationships and suggest that the aggregate of the relationships affects the organisational outcomes from sponsorship. These findings demonstrate how the composite effect of a set of relationships impacts on brand image transfer between the sponsor-sponsee entities. In this approach a specific dyad is embedded within a complex web of relationships with other actors that have a bearing, whether direct or indirect, on the sponsor's pay-off. Ryan and Fahy (2012) theorise a relationship portfolio platform as an approach to sponsorship network management.

Portfolio management is distinct by "a range of concurrent and overlapping ... relationships at any one time" (Ryan and Fahy 2012: 1149). However, beyond these initial insights, very little is known about portfolio management in sponsorship and what the influence on sponsorship effects is more holistically. There is a lacuna of understanding about portfolio management in transactional relationships generally, as well as how and under what conditions managing a portfolio of transactional relationship may result in societal value creation.

In addition to understanding how long-term same partner dyads generate sustainable societal value, research needs to consider the influence of relationship portfolios on the ability to contribute to societal betterment. As argued by Pettigrew et al. (2001) a holistic explanation requires an examination of the structures and processes as a 'nested' set of arrangements. The thesis seeks to provide some initial insights into how relationship portfolios operate at the transactional level. The thesis focuses on value creation that contributes to societal betterment, how NPOs manage relationships portfolios and to what effect is of interest here. This approach will also contribute to efforts to re-balance the field that is currently characterised by an asymmetry of perspectives from the firm's standpoint (Le Ber and Branzei 2010; Al Tabaa et al. 2012). Before proceeding in this direction however, the network perspective suggests that the external contextual factors such as the stimulus setting in which the phenomena occur need to be considered (Stake

1995; Pettigrew 1997; Pettigrew et al. 2001). Literature related to the influences of an environmental setting will be discussed next.

3.5.3 Societal betterment and transactional hybrids: A contextual setting perspective

The preview of literature shows that the potential impact of a specific context on the ability of transactional collaboration to create societal value is an area in need of focused examination. The mission of the NPO typically informs what social cause the collaboration furthers (Seitanidi 2010). This in turn provides the social context in which the relationship operates directly. Social context has been identified as a significant factor that influences value creation through collaboration (Carroll 1979; Wood 1991; Zadek 2004). It forms one of the key influencers in processual research (Stake 1995; Pettigrew 1997; Ryan 2006; Roppo and Sauer 2003), required for examining interactions (Pettigrew et al. 2001; Seitanidi 2008). Moreover, as well as considering whether the social issues are likely to be adopted as a contextual setting for collaboration (Zadek 2004), they also have a direct bearing on the processes through which value is created (Pettigrew et al. 2001).

Although collaborative value requires at least two organisations to join together, beneficiaries play a key role in giving collaboration legitimacy (Austin et al. 2006). The legitimacy relates to the approval indicated by beneficiaries by accepting the benefits channelled at them and their engagement in creating collaborative value. The latter indicates circumstances little understood due to the organisation-centric perspective that dominates current knowledge (Le Ber and Branzei 2010a). Incorporating beneficiary perspective moves the focus beyond the organisational boundaries and centres attention on the social context in which collaborative value creation occurs. This has significant implications on collaborative value creation as different contexts bear differently on the degree to which beneficiaries need to directly participate for the initial value to emerge (Di Domenico et al. 2009; Le Ber and Branzei 2010; Boorsma 2006). For example, in some contexts, such as those related to environment (Bendell 2000), infrastructure (Warner and Sullivan 2004) or improving services (Yunus 2011), the beneficiaries are consumers of the external value created by the organisations (c.f. Austin and Seitanidi 2014). In other contexts, much less represented in extant literature, active participation by the beneficiary

is crucial for value to emerge (Bhattacharya et al. 2005; Daellenbach et al. 2006; Boorsma 2006; Le Ber and Branzei 2010). This initial value then induces subsequent value creating interaction processes across other levels (Kolk et al. 2010). Reducing negative behaviours such as smoking amongst artists (Daellenbach et al. 2006) or encouraging positive behaviours as shown in Bhattacharya et al. (2005) in improving oral hygiene, are some examples of the different principles.

It is argued that an in-depth examination of the differences can contribute to a more detailed understanding of whether and how transactional NPO-business collaboration can contribute to societal betterment. The under-socialised extant research impedes a holistic understanding of how transactional collaboration creates value (Le Ber and Branzei 2010a), as well as a shared perception of how society is better off due to NPO-business collaboration (Austin 2010). The relational perspective appears to contradict the current organisation-centric conceptualisation of the difference between social and societal outcomes from collaboration. As defined by Seitanidi (2010:149) societal outcomes are “a result of the combined efforts of the two partners and which are delivered externally to society and not to the partner organisations.” This definition, however, considers a target beneficiary as someone with “needs that are attended by the collaborative action” (Austin and Seitanidi 2011: 8), and so the resultant benefits comprise macro level, societal value – i.e. value that is created for a constituent located outside of the collaborative action (Waddock 1988; Austin and Seitanidi 2012b).

The relational view, however, places target beneficiaries at the core of the collaborative action, making a distinction between social and societal outcomes based on creating value for target beneficiaries tenuous. Existing conceptualisations that consider value creation (Austin 2000; Seitanidi 2010; Bowen et al. 2010) or are specifically designed for analysing value creation through collaboration (Seitanidi 2010; Austin and Seitanidi 2014) are seemingly unsuitable for examining societal value creation through collaboration in relational contexts. The thesis utilises the arts context as a specific boundary to examine how transactional NPO-business collaboration creates value for society. Since artistic value creation underpins the social aspect of transactional collaboration in this context, the relational value production process bears significantly on how and to what effect value is created. The thesis, therefore, aims to extend the current conceptualisations of collaborative value creation for society by explicating collaborative value creation in the

relational context and in so doing addresses the relational context gap in literature. The following chapter (4) will situate the argument presented and the tentative thesis aims outlined so far within the arts context in the UK.

3.6 Summary

This chapter has looked at the dynamic nature of value creation in collaboration by reviewing the implications of the different stages of CC on value creation (Austin and Seitanidi 2014). It positioned the research problem within the interactions level of analysis as a subsection of the outcomes window, through which Austin and Seitanidi (2014) advocate outcomes of value creation in collaboration can be analysed. Value creation through different types of transactional relationships was discussed and hybrid transactional relationships were presented as carrying greater value magnitude potential as they incorporate advanced value indicators.

Different success factors at micro, meso and macro levels of analysis, within and outside collaboration reported in literature have been evaluated in order to gain insights into how the interactions between the levels and locations can contribute to societal value creation. The limited understanding of the micro level value creation beyond the participating organisations was raised as impeding a holistic understanding of collaborative value creation (Le Ber and Branzei 2010). The underdeveloped understanding of macro level value creation through transactional collaboration was raised. In particular, the chapter examined how value created within the collaboration arrangements transfers directly to macro level, and the structural and contextual factors that influence the ability to create societal value. Accordingly, the emerging significance of micro processes that influence value transfer (Kolk et al. 2010), of portfolio management (Ryan and Fahy 2012), and relational contextual setting (Le Ber and Branzei 2010) were presented as the potential factors that can influence societal value creation through transactional collaboration that the thesis aims to examine. The chapter closed with presenting the arts as the contextual setting that requires a relational perspective to value creation (Boorsma 2006; Kern 2006; Le Ber and Branzei 2010; see also Di Domenico et al. 2009 for dialectic insights) and, therefore, justifies the development of a tailored value creation framework. The next chapter will

embed the literature and the arguments outlined above in the context of the arts in the UK to fully explicate collaborative value creation in this setting.

CHAPTER 4: THE ARTS CONTEXT

4.1 Introduction

The close of chapter 3 proposed that researchers need to specify the social context that forms the basis of the respective contributions to theory building (Carroll 1979, Zadek 2004; Le Ber and Branzei 2010; Austin and Seitanidi 2014). The thesis utilises the arts context in the UK as a specific boundary to examine contributions to societal betterment through transactional NPO-business collaboration. Chapter 2 set out the collaborative turn within the private and the nonprofit sectors and the nature and type of relationships that the dynamic convergence produced. It introduced the gap in literature in terms of the ability of transactional collaboration to generate a greater magnitude of value for society by considering the different types of transactional relationships. Chapter 3 outlined the multiple internal and external contextual elements that influence the ability of different transactional collaborative arrangements to create societal betterment inducing value. In particular, the influence of transactional hybrids and relationship portfolios were highlighted. The need to integrate an individual beneficiary perspective into the predominately organisation-centric standpoint adopted in extant literature (Le Ber and Branzei 2010a) was introduced as a way of clarifying the processes of collaborative value creation on a micro level.

The purpose of this chapter is to contextualise these insights within the arts setting in the UK and so present a theoretical justification for grounding the study in the arts context. The concern of creating societal betterment through NPO-business collaboration has been narrowed to the arts, a single, yet multifaceted environmental setting. The conceptual stance is similarly narrowed to processual outcomes of collaborative value creation (Kolk et al. 2010; Austin and Seitanidi 2014) through which transactional collaboration in the arts context creates societal value.

This chapter starts by discussing the recent developments in the arts in the UK. It focuses on the progressive move from inward looking, autonomous approach in arts administration towards collaborative convergence (Weinstein 2010). This is followed by reviewing how value creation has been addressed in arts and business collaboration studies

and outlines the issues related to the overt focus on business perspectives. The concerns related to social and societal outcomes in transactional relationships are then discussed. The spectrum of arts benefits is discussed in terms of the implications at the micro, meso and macro levels of analysis. A discussion of the merit of adopting an interdisciplinary approach that enables the social aspect to be fully integrated into examining how transactional arts and business collaboration creates value for society is presented next. The chapter closes by summarising the research agenda adopted by the study.

4.2 The UK arts sector

The arts and culture have been described as “an essential public good, critical to a healthy society as a source of personal enrichment and a locus for building community” (Klein, Taylor and Warren 2005: 4). It is a crucial developmental tool (Şişmanyazici-Navaie 2004) closely aligned with social capital development (McNicholas 2004; Brown 2006) that has been evidenced to bring benefits to society, ranging from higher educational achievement and improved economic growth (Smith 2009). A report on the creative industries in Cardiff indicates that the creative sector is increasingly recognised in the UK for “wealth generation, employment opportunities, and social inclusion and regeneration strategies” (CC 2006:5). Creative industries significantly contribute to the UK economy and in 2006 accounted for 6.4% of the Gross Value Added (GVA). It is also one of the fastest expanding areas of the UK’s economy, with an average annual growth of approximately 4% from 1997 to 2006, compared to an average of 3% for the whole economy. The arts and creative industries generated almost 2 million employment opportunities in 2007 in the UK (DCMS 2009). The arts, therefore, play a significant role in shaping the British economy. However, the majority of the arts sector operates within the nonprofit sector which traditionally relies heavily on public funding. The problematic macroeconomic environment in the UK has impacted significantly on the operations of many arts organisations, and this is discussed next.

4.2.1 UK arts funding landscape

Arts administration in the UK has undergone significant restructuring in recent decades (Bussell and Forbes 2006; ACE 2011). One of the key factors that drove the shift is the significant drop in public funding: 38% between 2008 and 2011 in terms of the local authority expenditure. Further unprecedented cuts occurred in 2011, where over 200 arts bodies completely lost public funding (ACE 2011). This trend is set to continue for the foreseeable future as outlined in the recent Autumn Statement (Osborne 2014). The diminishing public funding is particularly problematic since the arts industry operates largely within the nonprofit sector in the UK, where public funding is the largest proportion of income. The diminishing funding has, therefore, become a significant threat to the long-term sustainability of cultural and creative provision in the UK. Although the role of the arts in society has long been debated (c.f. DiMaggio 1987; Carey 2005), continued negative developments in the cultural provisions can result in negative implications for social welfare. The funding deficit is not only a threat for the arts industry, but also for wider society. As such, it represents an imperative for the UK government to address.

The government has indeed recognised the problem and began addressing it by emphasising the necessity to share the responsibility for the arts amongst all societal sectors (DCMS 2011; Osborne 2014). The resultant open public arts funding debates have led to a proliferation of media and political interest that has reinvigorated the professional debate of the societal impact of the arts and the funding processes. The diminishment of public funding and its implications for society has become a pressing issue under discussion in academia, among practitioners, and in the media in the UK (Belfiore and Bennett 2006; see Chew 2009; ACW 2009, 2010, 2013; ACE 2012; A&B 2009; Higgins 2011; Bowie-Sell 2011). Societal learning in terms of the perceived importance of the role of the arts in improving societal welfare has thus arguably shifted from the latent, to the emerging stage, and is currently beginning to move towards the consolidating stage (Zadek 2004). Scholars have suggested that once societal learning about a particular cause becomes widespread, corporate interest gets activated. Zadek (2004: 162) proposes that “the trick” for companies hoping to operate within the ‘higher-opportunity zone’ of greater value potential “is to be able to ... credibly respond to society’s changing awareness of particular issues”. Bowen et al. (2010) clarify that since the nature of the social issue is one of the primary influencers on

community engagement strategy, the more widespread the societal learning about a particular issue, the higher the demand on the level of a company's response. The environmental factors in the UK have legitimised the arts as a desirable setting for corporate community involvement. Business support nowadays accounts for almost a quarter of the private investments in the arts, despite the recent downturn (Mermiri 2010; Mermiri and Tuchner 2011; Spedding, Tuchner and Gerolymbos 2012). Funding pressures have contributed towards an increasing convergence between the sectors through collaboration and it now serves as one of the key strategies in securing fiscal sustainability. How this has occurred in practice will be previewed next.

4.2.2 Diversifying funding: arts and business collaboration

The macro environmental factors discussed above and in chapter 1 have prompted arts organisations towards a more strategic approach to administration. Those arts organisations that fail to adapt to the 'new' environment fall victim to structural entropy (Weinstein 2010). There is however a new breed of arts organisations in the UK that have responded in an entrepreneurial manner (c.f. A&B 2014b). Administrators in these organisations remove the barriers that "arts organisations tend to build against the outside world" (Roppo and Sauer 2003: 53) to identify and learn from external stakeholders. Business tactics have been adopted to improve efficiencies in operations and to gain fiscal sustainability. Bussell and Forbes (2003) report that developing schemes that engage businesses have become one of the key strategies through which arts organisations supplement funding gaps. Weinstein (2010) similarly posits collaboration with business as a key area of application for sustainable operations, but not in the traditional form of being the passive recipient of corporate philanthropic grants. Instead the collaboration strategy centres on identifying the organisation's value-adding attributes and offering them as part of collaboration value exchange to a carefully identified partner (Weinstein 2010).

Despite the move towards a mutual exchange, empirical evidence shows that the transactional interactions in the UK take on multitude forms with some concerned with integrating reciprocity and strategic fit more than others (Moir and Taffler 2004; Knight 2010). Moir and Taffler (2004) confirm that there is no evidence of corporate philanthropy

being practised in the UK's corporate arts giving. Instead, two types of corporate support prevail: advertisers – those who seek reputational enhancement in a marketing sense, and legitimators, “firms [that] are also concerned with the business benefit of reputation [by] paying attention to the community”, i.e. with covert business motives (Moir and Taffler 2004: 158). Similarly, the scoping study for the thesis finds transactional interactions (Knight 2010) as the most common approach to relationships. The exchange is reciprocal, albeit to varying degrees, yet the business partner assumes the central role of an investor which skews the power relations. The imbalance of power impedes the emergence of true social partnerships of the integrative stage (Waddock 1998; Seitanidi 2010).

This would suggest that collaboration in the UK centres largely around the transactional stage of development, with the quasi societal orientation category suggesting transactional hybrids as presented in chapter 3. The basic principle that underpins these relationships assumes that the greater the reciprocity and organisational alignment, the greater the likelihood of innovation that benefits both organisations and society concurrently (Austin and Seitanidi 2014). This inevitably influences the type and magnitude of benefits contributed to both organisations and to societal betterment. The following section previews the processual changes observed in extant literature that have led to the current status of the interactions.

4.3 Trends in arts and business collaboration

The opening section of the thesis discusses how the changing perceptions of the role of the arts in society firstly triggered the unprecedented increase in arts and business interactions. Together with the changing external environment, this resulted in the paradigmatic shifts in the nature of the relationships (McNicholas 2004). The move towards more strategic thinking in the arts administration borne out of the necessity to survive triggered innovative value offerings aimed at attracting business partners. Concurrently, the economic downturn in the late 1980s raised questions regarding the legitimacy of philanthropic activities that entail no commercial reward for the support provided in business strategy (Bennett and Sargeant 2005; Gan 2006; Moir and Taffler 2004).

4.3.1 The commercial turn in transactional collaboration

These developments subordinated the personal motives of executives which traditionally based on philanthropic donations. However, it also skewed the focus of the interactions away from social domain to a commercial realm (O'Hagan and Harvey 2000; LeClair and Gordon 2000; McNicholas 2004; Kim 2009). Return on investment as one of the principle objectives originating in the commercial sponsorship arena (Cornwell and Maignan 1998) was inexorably incorporated into the arts domain. The associational value (Austin and Seitanidi 2012a) of the arts mission related to serving "community good and values such as creativity, excellence, pluralism, freedom, and innovation" (Kim 2009: 5) remained desirable, however tangible bottom line contributions of increasing sales through promotion and advertising permeated the arts support agenda (McNicholas 2004). Arts organisations were for the first time required to proactively reciprocate the corporate generosity.

Having gained a better understanding of the private sector through adopting business tactics, arts organisations responded to these demands by demonstrating how artistic methods can be used in developing business operations (Darso 2004; Weinstein 2010). In addition to using the arts simply as decoration or entertainment, artistic methods to facilitate change, development and learning entered the interactions (Darso 2004; Weinstein 2010). The largely unilateral support flowing from business to the arts shifted to a transactional relationship utilising a marketing approach (McNicholas 2004) and a strategic development orientation (Darso 2004). The increasingly bilateral, more complex benefits exchange provided scope for further growth in the interactions that improved value capture opportunities for both partner organisations.

However, the purely transactional orientation altered the logic behind the interactions from helping the arts to better serve society, to enhancing economic value for business. This was often achieved by tailoring artistic production to suit the needs of the business partners. Wu (2003) illustrates this commercialisation of the arts by discussing the atypical expansion of the board of trustees at Whitney Museum of American Art in New York during its financial pressures in the 1980s. The board expanded from seven Whitney family trustees to 38 members in the late 1980s and these were largely made up of top level executives whose motivations were overtly commercial:

“Our basic decision as a corporation was not in the development of art; our basic decision as a corporation was that we had to be unique and have a personality and an identity that was different from the rest of the tradition-bound [tobacco] industry.” (George Weissman, Trustee, quoted in Wu 2003: 92)

The perceived overshadowing of the inherently social orientation of the arts resulted in a public outcry accusing the corporate world of exploitative practices rather than the purported adoption of social responsibility alluded to in publicity and CSR reports (c.f. Clarke, Evans, Newman, Smith and Tarman 2011). These practices, recently coined as ‘artwash’ (Evans 2015), persist and a recent example is encompassed in the ongoing debate over BP sponsoring Tate Modern Gallery. On the unveiling of this relationship, the general public and the art world were abhorred by the attempts to ‘abuse’ a beloved gallery for what was described as legitimising corporate greed. The opposition to oil companies engaging with public arts institutions resulted in the establishment of a ‘Culture Beyond Oil’ movement that actively lobbies against such relationships (c.f. Clarke et al. 2011). Many arts organisations before Tate Modern faced stakeholder dissatisfaction linked to accusations of selling out for easy money by tailoring the artistic programming to suit corporate needs (c.f. Wu 2003) and/or providing social kudos to corporations that through negative externalities damage societal welfare (c.f. Clarke et al. 2011; Evans 2015). The credibility of arts and business interactions faced increasing scepticism.

4.3.2 Societal orientation in transactional collaboration

As a counter to the growing opposition towards crude transactional interactions, both the arts organisations (Bussell and Forbes 2006) and the business partners (Ryan and Fahy 2012) began to incorporate more interactive relationships, building over time (McNicholas 2004; Knight 2010). Relationship marketing practices that emerged in the mid 1990s in the private sector (Gronroos 1994) penetrated into the arts administration with the adoption of ‘managerialism’ as part of the professionalising efforts (Rentschler et al. 2002; Conway and Whitelock 2004). Both sectors also began to incorporate stakeholder

management into strategic decision making (Wood and Jones 1995; Scheff and Kotler 1996). The arts managers realised the benefits of retaining the same partner and developing a close working relationship to help the organisation achieve its mission in a variety of ways, rather than investing time into 'courting' new business partners that may not materialise (Knight 2010). Smaller nonprofit arts organisations in particular rely on volunteer labour benefit from closer relations. For example, a lack of manpower is often raised as one of the key challenges for small arts NPOs (c.f. Chew 2009). The relational approach enables the development of operational support through pro-bono and employee volunteer programmes (McCarthy et al. 2001; Kim 2009).

For business, the successes of relationship marketing (Gronroos 1994) and of developing sustainable internal and external stakeholder relationships (Freeman 1994) prompted a more balanced engagement with local communities. One approach to community involvement is developing long-term, sustainable and mutually beneficial relationships with nonprofit arts organisations (Porter and Kramer 2011). The emphasis on developing longer-term associations brought the organisations closer together and resulted in growing commitment and trust between the partners (Austin 2000). The resultant improved understanding of each other's capacities and capabilities increases the magnitude of collaborative value by complementing each other's resources. The growing symbiosis between the partners re-introduced the societal perspective as the basis of the postmodern interactions that are distinct by "a fusion or synergy between the arts and business core values" (McNicholas 2004: 59). Austin and Seitanidi (2012a: 731) describe the synergistic mode as:

"... the underlying premise of all collaboration that combining partners' resources enables them to accomplish more together than they could have separately... [through] innovation... that produces completely new forms of change... holding the potential for significant organisational and systemic transformation and advancement [for individuals, organisations and society]".

The evolution of these interactions points to significant differences in generating value that contributes to societal betterment. However, research that examines value creation in arts and business interactions is sparse, particularly in relation to societal value

creation. Much current literature adopts the firm-centric perspective and focuses on the motivational drivers (Moir and Taffler 2004; Knight 2010). Also, these studies provide largely descriptive accounts of the evolution in the interactions and what type of outcomes are likely to accrue to the collaborating partners at each stage (Martorella 1996b; O'Hagan and Harvey 2000; McNicholas 2004; Kim 2009). How the different stages influence value creation, what factors impact it and how the value created affects societal betterment is little known.

McNicholas (2004: 58) notes that the most recent shift in arts and business relationships sees processes move away from the traditional business relationship perspective to strategic matching of core values that generate greater opportunities for value generation. However, McNicholas (2004) considers the incremental link between activities and value solely from the business perspective as an effect on corporate image. Kim (2009) develops a classification of different types of relationships based on the distinct characteristics, sectoral drivers, interorganisational factors, and operational elements from a dyadic perspective. The framework largely reflects prior works on NPO-business collaboration discussed in chapters 2 and 3 (c.f. Austin 2000; Wymer and Samu 2003; c.f. Austin and Seitanidi 2014). Although the four stage approaches are labelled as traditional philanthropy, transactional collaboration, strategic alliances, and venture philanthropy, the latter two largely mirror the integrative and transformational stages of CC (Austin and Seitanidi 2014).

Kim (2009) further reports transactional collaboration and strategic alliances as the most common approaches. Both McNicholas (2004) and Kim (2009) concur with the notion incumbent in collaboration literature that the traditional, selfless philanthropy has largely been replaced with transactional relationships (Martorella 1996a; Leclair and Gordon 2000; O'Hagan and Harvey 2000; Burlingame 2001; Saiia et al. 2003; Moir and Taffler 2004; Frank and Geppert 2004; Bennett and Sargeant 2005; Weinstein 2010).

In addition, McNicholas (2004) states that the current discourse is marked by negative economic and societal occurrences that cause uncertainty and lack of trust. As the key building block of relationship formation, the full progression towards the integrative/transformational paradigm has been stymied. Kim (2009: 5) adds that since "relationships based on 'reciprocity' or 'mutuality'" are more implied "than giveaway in practice" evidence points to the prevalence of transactional approaches.

This theorising reflects the findings of the scoping study parenthetically mentioned in chapter 1. Through investigating business motivations to support arts organisations, the study concluded that the practiced approach is transactional. Motivations aimed at societal improvement are typically preceded by strategic motivations linked to profitability. Business assumes the role of the investor resulting in asymmetrical power relations in the relationships. The study found no evidence of social partnerships (Waddock 1988; Seitanidi and Ryan 2007) and the lack of altruism refutes corporate philanthropy. Depending on the degree of interest in also improving arts provision, the type of relationship is commercial (little/no interest) or socio-sponsorship (socially oriented objectives present). Socio-sponsorship exhibits multistage characteristics (Seitanidi and Ryan 2007) and denotes a hybrid transactional form (Austin 2000).

Accordingly, since the transactional hybrids, identified in chapter 3 as a distinct approach to transactional collaboration, fall on the cusp of the transactional and strategic approaches, table 4 summarises Kim's (2009) classification of the transactional and strategic approaches. This classification enables the examination of societal value creation through insights into the longevity of the relationship, the proximity between partners, the magnitude of resources, the level of value co-creation and synergy, the locus of control, and the potential to contribute to societal betterment through the arts over organisational orientation. It also classifies distinct relationship types as representing each model type.

However, the linear approach to classifying the different approaches using structural and governance characteristics replicates the problem of hybrid transactional relationships discussed in chapter 3 about the current understanding of societal value creation. Socio-sponsorship (Seitanidi and Ryan 2007) that has been identified by the scoping study as a widespread approach to nonprofit community arts and business collaboration (Knight 2010) denotes one such hybrid. Similarly, wider NPO-business collaboration studies classified by Seitanidi (2010) transcend the linear boundaries. Although transactional in nature, the hybrid characteristics enable the emergence of synergistic value type benefits, the precondition of societal betterment. However, extant research lacks any explication of how this occurs in arts and business collaboration in practice.

In addition, the framework largely focuses on the structural and governance characteristics of arts and business relationship dyads. Indeed, much understanding of arts and business collaboration, whether based on structural or organisational outcomes, is

derived from examining relationship dyads (e.g. Roppo and Sauer 2003; Darso 2004; Daellenbach, Davies and Ashill 2006; Kim 2009; Preece 2010). Although Kim (2009) considers relationship portfolios as the future of arts and business collaboration, the discussion is limited to the ideal mix of relationship types rather than its impact on societal value creation. This substantiates that arts organisations are embedded in a wider network of relationships that affects their actions (Moller and Halinen 1999), yet what bearing portfolios have on collaborative value creation for society in the arts context remains unknown. These are the key areas investigated by the thesis. Before moving in that direction, however, the next section will first discuss the current understanding of societal value creation in transactional arts and business relationships.

Table 4: Transactional and strategic models of arts and business relationships adapted from Kim (2009)

Primary models	Model descriptor	Control & focus orientation	Distinct relationship types
<i>Transactional collaboration</i>	short term transactions More equal resource exchange	Business ↑ ----- ↓ Arts mission	Strategic philanthropy; Corporate arts sponsorship; Cause-related marketing; Joint-issue promotion
<i>Strategic alliance</i>	deeper mission fit & strategy synchronization joint value creation multiple resource type and scope greater inter-organisational integration		Research laboratory (Joint R&D between technology companies and media artists); Licensing; Co-production (production companies working together)

4.4 Societal value creation in transactional arts and business collaboration

Transactional relationships are widespread in society (McNicholas 2004; Kim 2009; Knight 2010). Approximately 18% of all sponsorship in the UK goes to the arts (A&B 2009). However, few studies have examined the value-added of this type of NPO-business collaboration, particularly in terms of exploring how the multifaceted relationships contribute towards improving society. Transactional arts and business interactions mirror the transactional collaboration continuum presented in chapter 3. The scoping study

identifies two extremes of transactional approaches: traditional commercially oriented relationships that focus on organisational value generation, and advanced, socially driven relationships (Knight 2010). The latter, arts transactional hybrids, see positive outcomes for society multiply (McNicholas 2004) but how and under what circumstances societal betterment emerges from this is largely unknown. Anecdotal evidence shows that arts and business interactions generate outcomes that positively impact on social capital and induce systemic changes (e.g. McNicholas 2004; Şişmanyazıcı-Navaie 2004; A&B 2014). The paucity of 'frontier' relationships reported in the arts context (McNicholas, 2004; Kim 2009; Knight 2010) suggests that transactional relationships present a rich milieu of applied investigation that may shed light on the contributions of arts and business interactions to societal betterment. The current understanding of value drivers and benefits generated by this type of relationships at multiple levels will be discussed next.

4.4.1 Value drivers and benefits: The business view

Knowledge about arts and business collaboration mirrors the findings of Seitanidi (2010) that organisational objectives are prioritised over societal ones. Moreover, most existing studies focus on the value-adding capabilities of arts-based collaboration to the business partner. An overtly economic motivation of business partners related to image and reputation building through advertising (O'Hagan and Harvey 2000; Leclair and Gordon 2000; Frank and Geppert 2004; Knight 2010) and enlightened self-interest through community engagement (Moir and Taffler 2004; McNicholas 2004; Kim 2004; Knight 2010) is reported. Moir and Taffler (2004) categorise the business partner motives as advertisers and legitimators, respectively. The strategic approach generates benefits such as: incentives and entertainment opportunities for customers, employees and clients; improving goodwill and legitimization; and gaining a licence to operate. Australia Foundation for Culture and the Humanities (AFCB) (1999) reports three major areas of commercial return as: corporate legitimacy, market advantage, and employee benefits; and these are similar to the findings of A&B (2009) as the key arguments to encourage corporate arts support.

These studies show similarities between the individual and organisational level benefits reported in general collaboration studies and those associated with arts support.

Arts support further entails entertainment, as well as creativity and innovation as the underlying force behind the potential value drivers, due to the inherent aesthetic and creative nature of the arts (Scheff and Kotler 1996).

4.4.2 Towards a dyadic understanding of value drivers and benefits

Despite the focus on business benefits generation in arts collaboration studies, the value drivers reported in these studies indicate a wider value potential. The arts organisations and their employees, and the wider society are seen as potential beneficiaries (Ryan and Fahy 2003; Ryan 2006; McNicholas 2004; Moir 2004; Knight 2010). Scheff and Kotler (1996) previously theorised the potential benefits for arts organisations to include financial and non-cash contributions, management and skills expertise, an increased volunteer pool, and technological improvements. McNicholas (2004) lists money and management expertise as the key meso level benefits for the arts partner. Moir (2004) identifies community development and educational opportunities as societal benefits. McNicholas (2004: 62) perceives arts support as indirectly benefiting society through helping to create “an ‘arts dividend’ and ‘creative capital’ bonus for communities and cities with flourishing arts and cultural environments and industries”.

However, these broader gains largely denote business espoused outcomes of collaboration. A holistic understanding of the outcomes as derived from the arts organisation’s perspective and the target beneficiaries is underdeveloped. Only two studies appear to have considered the outcomes from a dyadic organisational perspective. Kim (2009) approaches the potential gains as sectoral drivers behind collaboration. Weinstein (2010) categorises these as external–marketing related benefits, and internal–employee and capacity building benefits. Arts organisation benefits range from developing organisational capacity to greater access to sponsorship and grants (see table 5 for a full breakdown of benefits).

Table 5: Breakdown of meso level benefits in arts context
Adapted from Kim (2009) and Weinstein (2010)

	Arts Organisations	Business
Kim (2009) - Transactional collaboration & strategic alliance drivers	financing, credibility, greater recognition and increased dissemination of work, audience development, acquiring operational support, volunteering, pro bono services and other business resources, impact on mission, career pipeline for artists in within industry collaborations; access to advanced human & technical resources; professional networking	marketing, PR opportunities, increased sales, target market relations, human resource enhancement competitive advantage, resource efficiency, sales increase, tax deductions, supporting the values of the arts in the community and society in general; improving skilled employee pool for recruitment; utilise artistic expertise in operations
Weinstein (2010) – overall collaboration benefits	Development of organisational capacity, knowledge and expertise; engaging new audiences by circumventing entry barriers to new markets and geographic areas; build networks, facilitate future collaborations and social capital; foster efficiency by discouraging duplication; pooling of resources; reducing costs through improved venue management and economies of scale; enhance revenue through reputational effects; improve audience access and exposure; greater access to potential donations, sponsorship and grants.	External: greater likelihood of brand purchase; reputation and brand image improvement; higher levels of awareness/ advertising recall. Internal: attracting/retaining good employees - improved employee satisfaction, morale, loyalty and employee identification; employee pride; development of high-touch, high-concept employees; team building; communications training; leadership development; problem solving; innovation; arts as a basis of strategic process of transformation – personnel develop of leadership, culture and identity, creativity and innovation; customer relations; marketing

Beyond the descriptive indicators, however, very little insight exists into how the benefits accrue and how they contribute to creating societal value. The predominant organisational level perspective results in the body of knowledge lacking any form of explication of the potential interactions within and across the different levels in the process of value creation in the arts context (Kolk et al. 2010). Particularly deficient is knowledge related to the benefits entailed in the arts phenomenon, and the micro-processes of how the benefits received by arts organisations contribute to business, social and societal value creation (Kolk et al. 2010; Vock et al. 2011) and the process of co-creation (Austin and Seitanidi 2014). Providing a detailed account of the interaction processes through which value for society is generated in transactional collaboration in the arts context using the lens of a combined organisational and beneficiary-centric standpoints denotes one of the principal aims of the thesis. Studies located outside the immediate business and collaboration research domains can arguably inform the value generating potential of the arts and, therefore, provide conceptual guidance for this study, as previewed in the following, closing section of this chapter.

4.4.3 Societal value creation: The arts perspective

The arts are traditionally regarded as ‘highbrow’, largely inaccessible to those deemed by the ruling classes not to possess the necessary aptitude to appreciate the inherent artistic aesthetics. Such genteel disposition is strictly linked to social status and scholarly tastes, and is, therefore, largely unreachable to the lower social classes (Carey 2005). However, many argue that anyone can benefit from exposure to the arts, due to its uplifting properties (see Carey 2005, pp. 96-134). In a series of publications on art and culture (1907, 1919, 1926), Czech novelist Karel Capek argued that art needs to be accessible to the general public. Amongst other influences, art can break down the barriers between social classes. It constitutes a capacity to improve people and act as a vehicle for progress.

“Art... is a means of communication and therefore of progress, that is, of the movement of humanity forward towards perfection.” (Tolstoy 1924: 278).

An increased emphasis is perceptible nowadays on maintaining the engagement of individuals with an interest in the arts in the UK. The proliferation of various arts-based social initiatives (ADUK 2012; ACW 2013) and the significant growth in the creative industries envelopes this trend (DCMS 2009). Also discernible is the growing effort to extend accessibility to creative spheres to individuals who previously for whatever reason were not afforded such opportunity, and to actively encourage the participation of groups from disadvantaged backgrounds (see Reeves 2002).

In the UK, the explicit focus and appropriation of the arts and culture as “a mere tool for the achievement of governmental targets” has resulted in them being regarded more for their instrumental rather than intrinsic value (Belfiore and Bennett 2006: 6). Consequently, the majority of recent studies evaluating the impact of the arts and culture, “rolled up by government ministers into the one economic/industrial category – ‘the creative industries’” to reflect their instrumental value (Tusa 2002: para. 5), examine the impact and effects of the arts on issues such as economic development, place marketing, health, education, community cohesion and social inclusion, etc. (Matarasso 1996; Selwood 2001; Reeves

2002; Klein et al. 2005; CC 2006; Belfiore and Bennett 2006). However, Şişmanyazici-Navaie (2004: 181) argues that the developmental aptitude of the arts is still largely unknown:

“... although there are so many individual organizations and advocate groups that work in the creative sector, the understanding of the arts as a powerful means for creating positive social change in our daily lives is still at its embryonic stage...”

Despite the dearth of data based evidence of the contribution of the arts to create societal value in terms of meso and macro level benefits, a number of studies examining the role of the arts in generating benefits to individuals indicate significant potential on the micro level basis, particularly in terms of a ‘locus of control’ (Lefcourt 1982; c.f. Reeves 2002). The next section examines the current understanding of the developmental aspect of the arts.

4.4.3.1 Instrumental arts

The role of the arts in society has been under contestation and its impact on societal development remains contested (c.f. Carey 2005). A number of studies in recent decades have looked at providing specific indicators of arts value to society. The work of Comedia³ entails much of this effort in the UK. As part of Comedia’s agenda of the role of cultural activity in urban regeneration, Landry et al. (1996) analyse 15 case studies of British and Western European cities where cultural initiatives have been used to drive individual and community development. Ten types of benefits comprise the key outcomes of cultural activities which include developing self-confidence, building private and public sector partnerships and enhancing organisational capacity, etc.

Matarasso (1997) conceptualises the potential social benefits and substantiates the social and societal impacts arising from participation in the arts. Building on the six principal themes identified in Comedia’s scoping research (Landry, Bianchini et al. 1993), the seminal study offers a framework of social impact that ranges from personal development to social

³Comedia is an organisation “...concerned with city life, culture and creativity... and the key role of cultural industries.” (<http://www.comedia.org.uk/>).

cohesion and local image and identity, etc. The study lists 50 social impacts of participation in the arts categorised under the aforementioned main themes (see table 6 for list). Other benefits may arise from different contexts and/or analyses and no single project is expected to deliver the full taxonomy (Matarasso 1997). Şişmanyazici-Navaie and Etili (2006) examine the arts for development notion and categorise the potential benefits of the arts for society as intangible, such as bringing a sense of optimism and tolerance. It also inspires revitalisation which attracts residents and tourists, and retains businesses and employees. The difference essentially relates to the outcomes and impact as the different levels of results achievable in societal betterment (Brown 2006, Austin and Seitanidi 2012b).

Table 6: 50 social impacts of participation in the arts

Source: Matarasso (1997)

50 SOCIAL IMPACTS OF PARTICIPATION IN THE ARTS
1. Increase people's confidence and sense of self-worth
2. Extend involvement in social activity
3. Give people influence over how they are seen by others
4. Stimulate interest and confidence in the arts
5. Provide a forum to explore personal rights and responsibilities
6. Contribute to the educational development of children
7. Encourage adults to take up education and training opportunities
8. Help build new skills and work experience
9. Contribute to people's employability
10. Help people take up or develop careers in the arts
11. Reduce isolation by helping people to make friends
12. Develop community networks and sociability
13. Promote tolerance and contribute to conflict resolution
14. Provide a forum for intercultural understanding and friendship
15. Help validate the contribution of a whole community
16. Promote intercultural contact and co-operation
17. Develop contact between the generations
18. Help offenders and victims address issues of crime
19. Provide a route to rehabilitation and integration for offenders
20. Build community organisational capacity
21. Encourage local self-reliance and project management
22. Help people extend control over their own lives
23. Be a means of gaining insight into political and social ideas
24. Facilitate effective public consultation and participation
25. Help involve local people in the regeneration process
26. Facilitate the development of partnership
27. Build support for community projects
28. Strengthen community co-operation and networking
29. Develop pride in local traditions and cultures
30. Help people feel a sense of belonging and involvement
31. Create community traditions in new towns or neighbourhoods
32. Involve residents in environmental improvements
33. Provide reasons for people to develop community activities
34. Improve perceptions of marginalised groups
35. Help transform the image of public bodies
36. Make people feel better about where they live
37. Help people develop their creativity
38. Erode the distinction between consumer and creator
39. Allow people to explore their values, meanings and dreams
40. Enrich the practice of professionals in the public and voluntary sectors
41. Transform the responsiveness of public service organisations
42. Encourage people to accept risk positively
43. Help community groups raise their vision beyond the immediate
44. Challenge conventional service delivery
45. Raise expectations about what is possible and desirable
46. Have a positive impact on how people feel
47. Be an effective means of health education
48. Contribute to a more relaxed atmosphere in health centres
49. Help improve the quality of life of people with poor health
50. Provide a unique and deep source of enjoyment

The dichotomy between the instrumental and intrinsic value of the arts persists (Belfiore and Bennett 2006). The disproportionate research focus on the developmental aptitude of the arts attracts calls that the “art for art’s sake principle” is restored as a guiding principle for cultural policy to re-balance the focus and to prevent devaluing art as simply a means to other ends (Tusa 2002). Shared understanding of the benefits that the arts can offer society requires that the benefits intrinsic to the arts product/activity are considered. The attempts that researchers have made at integrating the developmental benefits with the intrinsic and how the delineated benefits can be categorised according to the level at which they accrue, will be previewed next.

4.4.3.2 Reconnecting with the intrinsic benefits

Belfiore and Bennett (2006) reconnect the policy debates with the complex historical philosophies underpinning the arts and consider their transformative powers. The authors provide a classification of how the arts affect people and society as a whole, both positively and negatively. However, the largely descriptive taxonomy only offers an initial basis for further investigation. Categorising how the indicators benefit individuals, the economy through improving organisations, and the society overall is missing. Further gaps relate to whether and how the individual benefits transmit to organisations and society and vice versa. Since understanding these micro-processes is crucial to delineate the impact on societal betterment, the next section discusses literature that can provide indicators of how value emerges as part of the benefits accrual and how it transmits across levels in artistic activities.

4.4.3.3 The multilevel map of arts benefits

Brown (2006) provides a multilevel framework of benefits that include the intrinsic and developmental perspectives by considering the social dimension of arts benefits that includes individual, interpersonal and community benefits and how close to the arts experience the benefits occur. The benefits range from the imprint of an arts experience on an individual and community level, to macro-social benefits that include economic impacts

and social capital. Human interaction is central to creating arts benefits and entails value transfer that may occur as a result of the arts typically occurring in a communal setting (Brown 2006). However, the study stops short of elaborating on the relevance of the time dimension. Since the different types of benefits and/or their effects work differently in terms of value emergence, their impact on societal value creation is likely to vary. The different modes of value and their effect on societal betterment as produced through transactional arts and business collaboration is another key area that the thesis investigates.

Brown's (2006) framework nevertheless offers initial insights into the direct positive correlations between the arts and cultural economies and market economies.

Şişmanyazici-Navaie (2004) suggests that the opportunities for face-to-face interaction help develop connections among individuals. The shared experiences provide a platform for social networks to develop as well as "the norms of reciprocity and trustworthiness that arise from them" (Putman 2000: 19). Through "increasing the level of economic activity, creating a more livable environment, and promoting a sense of community pride... diversity and pluralism" (McCarthy et al. 2001: 115), value generation through the arts links both to cultural capital (Şişmanyazici-Navaie 2004; Throsby 2006) and social capital development (Putman 2000). Hence, the more successful the arts scene, the more likely it is that macro-social benefits will emerge. As commented by McNicholas (2004: 62):

"... studies reveal a peripheral benefit of lively arts and cultural urban environments – that is, as a key factor in the decisions of innovative, creative people about where to live and work..."

Sampson et al. (2005) further observes that following the decline in neighbour relationships, the contributions of nonprofit organisations that enable people to build relationships is a key contributor to developing social capital. Where arts and business collaborations create provision through which personal and professional relationships can be developed, the social capital development is strengthened and so the collaboration indirectly contributes to societal betterment. As commented by Halpern (2009), societies rich in social capital provide better living conditions.

Moreover, as innovation and creativity become pivotal factors in achieving differentiation in an increasingly competitive environment (see Drucker 2001; Phillips,

Deiglmeier and Miller 2008), the arts assume a role of the conduit to industry growth and so enhance society's economic strength (McNicholas 2004; CC 2006). The arts can offer a platform for social, political and economic progress (Reeves 2002), strengthening the key pillars for societal betterment. However, since a limited number of studies in the arts discipline examine the societal value creation through arts-business co-creation lens, how societal betterment occurs is little known. This aim of the thesis is to provide a detailed account of how transactional arts and business collaboration can contribute to societal betterment by also considering the internal and external contextual elements that may influence it.

4.4.4 Interdisciplinary view

The largely unilateral arts-centric focus of the social effect of arts value has prevented a comprehensive understanding of societal value creation which is co-created through interactions with business and at multiple levels and across the locations (Wood 1991; Selsky and Parker 2005; Kolk et al. 2010; Austin and Seitanidi 2014). In turn, studies within the business domain lack integration of the arts related benefits and of the distinct processes through which artistic value emerges. The distinct process of artistic value creation carries implications for the micro-processes through which societal value from arts and business collaboration can emerge. This indicates the need to tailor existing frameworks for analysing societal value creation through transactional NPO-business collaboration to the arts context and this is discussed next.

Understanding the process of artistic value creation requires the adoption of a relational perspective that sees art consumers as arts value co-creators (Sicca 2000; Boorsma 2006; Schusterman 2001). Schusterman (2001) states that art work itself does not define artistic value. Rather, the act of experiencing the arts is the final criterion. Sicca (2000: 151) sees the consumer not as "a passive subject in the process of value creation but a prosumer who [takes] part in that process". The relational view has significant implications to the understanding of how arts organisations create value for society with or without the help of external partners. Since arts organisations rely on arts customers to co-create artistic value, the arts consumers or beneficiaries play a crucial role in an arts organisation's ability

to fulfil its mission. In this context, the beneficiaries cannot merely be considered as external constituents for whom value is created (Sicca 2000; Boorsma 2006). They form a key element of the value proposition of arts organisations in society. This carries a significant bearing on the processes through which value creation emerges and functions in arts and business interactions. As proposed by Le Ber and Branzei (2010a), value creation and capture vary across different beneficiaries groups, and essentially the degree of potential value creation is likely to vary with the social purpose addressed.

The discussion in chapter 3 shows that existing frameworks for analysing value creation in wider collaboration studies consider beneficiaries as external recipients of value created by the collaborating organisations (Kolk et al. 2010; Austin and Seitanidi 2014). The merit of the prior conceptualisations is in no way questioned here, yet it is suggested that the processes of value creation may differ in the relational context. An alternative framework that accounts for the differences in value emergence in the arts context, therefore, appears to be justified. It demands that the beneficiary perspective is integrated fully to gain an understanding of how arts and business organisations coming together can create value for society. The following section will elaborate the conceptual stance adopted by the thesis and summarise the thesis aims, as discussed throughout the literature review.

4.5 Conceptual stance summary

Overall, the study responds to the recent formulation of the issues within the NPO-business collaboration field that prevent a holistic understanding of value creation, communicated by Austin and Seitanidi (2012a: 728):

“There is a lack of... definitional precision about what value is and about the dynamics of how different underlying collaboration processes contribute differentially to value creation... Key success factors are abundantly offered but often without substantiating specification of the causal linkages for value creation. Furthermore, there is confusion or limited recognition of differences in value creation potential across different types of collaborative relationships.”

The previewed literature in chapters 2 and 3, and the discussions above show the magnitude of value creation in NPO-business collaboration as moderated by the current stage of the alliance on the collaboration continuum (Austin 2000; Austin and Seitanidi 2014), as well as by the type of collaboration created (Wymer and Samu 2003; Seitanidi and Ryan 2007; Kim 2009).

The arts context further demands that a relational view is adopted as artistic value creation and, therefore, the value proposition of arts organisation hinges on beneficiaries and their co-creative response in the process of producing artistic value. Furthermore, to respond to calls in literature to focus collaboration research on how different approaches in different contexts benefit society “we ought to ... ask what type of CR is associated with what types of financial and societal performance and under what particular circumstances?” (Halme and Laurila 2009: 326); transactional relationships (Austin 2000) are here defined as the broad unit of analysis. Recent theoretical studies call for research into the latest forms of collaborative relationships to further the most valuable innovation benefits (e.g. Phills et al. 2008). However, it is argued here that to remain relevant to the practitioner community, as well as to strengthen theory building of value creation in NPO-business collaboration field, it remains relevant to examine the range of transactional collaboration approaches as the most commonly practiced form of collaboration (Googins et al. 2007; Kim 2009; Knight 2010). In addition to examining the capacity of the relationships to contribute to societal betterment simply as dyads, literature points to collaboration portfolios as the future of understanding societal value creation in collaboration. The thesis will further examine how and under what conditions managing a portfolio of transactional relationship by an arts organisation may result in societal value creation.

As defined in the opening chapter under ‘functional elements of arts organisations’, the context centres specifically on community arts. The emphasis in community arts is on pro-community and/or pro-societal objectives, as opposed to explicit marketing related objectives of high arts. The study centres on societal betterment as generated through community arts organisations and business collaboration, where the arts imply both “an essential public good” (Klein et al. 2005) and a ‘developmental tool’ (Şişmanyazıcı-Navaie 2004). The next section outlines how the study aims to answer this call.

4.5.1 Study Aim

Based on the literature previewed in this part of the thesis, the aim of the study is to examine how community arts organisations and businesses engaged in transactional collaboration create value for society, as a way of answering the overarching question:

“How do arts and business organisations create value for society through collaboration?”

There is a dearth of relevant research and a lack of applicable taxonomy of societal value creation in the arts context. Therefore, chapter 6 portrays a case study that explores societal value creation in arts and business collaboration, with the view of developing conceptual propositions.

To guide the construction of the conceptual framework, the research agenda consists of the following broad objectives. The broad aim seeks to:

- define the relational/contextual dynamics through which societal betterment is given expression/is untapped through transactional collaboration in the arts context

This is further broken down to a set of more specific objectives:

- to provide a detailed account of the approaches to transactional collaboration through which societal betterment emerges
- to provide a detailed account of the interaction processes through which value for society is generated in transactional collaboration in the community arts context, through the lens of a combined organisational and beneficiary-centric standpoints
- to provide a detailed account of how societal betterment emerges through managing a portfolio of transactional relationships by a community arts organisation

- to articulate the nuances of value that benefits the wider society as generated through transactional collaboration between community arts business organisations.
- to convey the meaning of collaborative value for society as perceived by the different stakeholders of hybrid transactional relationships between community arts organisations and for profit organisations

4.6 Summary

The chapter contextualised the thesis in the arts, specifically within the UK's arts environment. The initial sections previewed the current developments in the UK's arts scene and the changes that have contributed to the collaborative shifts in arts administration. It then previewed the different trends that have impacted arts and business collaboration since the era of corporate philanthropy. Value creation outcomes in different arts and business collaboration studies, indicated the overlap between the individual and business meso level benefits in general and in arts-based collaboration. Gaps in the research related to the lack of understanding of a) the organisational benefits for the arts partner, and b) the social and societal benefits potential of arts and business organisations working together were outlined. The business espoused social and societal benefits were critiqued as failing to clearly articulate the shared perspective.

The next part evaluated the benefits of the arts to society as offered by the adopted multidisciplinary approach to the research problem. Instrumental versus intrinsic debate regarding the benefits of the arts to society was previewed and a number of integrated value indicators outlined. These were subsequently examined in terms of their implications on individual, organisational and societal levels to enable integration with the different levels of analysis proffered in the wider collaboration research outlined in chapter 3. The relational perspective to understanding artistic value emergence was introduced and its influence on collaborative value creation was raised. The fundamental role that beneficiaries play in artistic value creation was discussed as a key factor and it requires that a beneficiary-centric standpoint is integrated into the overly organisational perspective that collaboration studies tend to adopt. The final section introduced the perspective adopted by

the study before closing with a set of objectives delineated for guiding the empirical execution of the research problem.

Having set out the research agenda, the following chapter will outline the research design and where the implications of the philosophical stance lie. It will also detail the nature of the studied phenomenon.

CHAPTER 5: RESEARCH DESIGN

5.1 Introduction

The previous chapters presented the rationale and theoretical underpinnings of the substantive topic of the thesis. The attention now turns to providing an account of how the research was carried out. A comprehensive research design serves to protect researchers from producing idiosyncratic and irrelevant findings (Mason 2002a; Saunders, Lewis and Thornhill 2012). It demonstrates how the data used were gathered. As Wolcott (2009: 86) emphasises, “methodology refers to underlying principles of inquiry” and communicates the “way-in to the substance of your study” (Wolcott 2009: 25).

This chapter serves as a linking mechanism between the introduced theoretical understanding and the results of the field work, presented in the ensuing three chapters. It opens with a philosophical stance and introduces the subjectivist standpoint, specifically the interpretive constructivist paradigm (Denzin and Lincoln 2000a), as the preferred “frame of reference, mode of theorising and ‘modus operandi’” (Burrell and Morgan 1979: 23). The design attends to the methodological implications of the philosophical stance, before turning to the research strategy, the methods adopted in the fieldwork and the analytical approach used to reach the conceptual framework presented in chapter 8. The chapter then considers research ‘politics’ and ethics. A summary of the section closes the chapter.

5.2 The philosophical stance

“Science exists only in people. Each scientific project has its creative inception, its process, and its tentative conclusion, in a person or persons. Knowledge – even scientific knowledge – is that which is subjectively acceptable.” (Rogers 1961: 216)

The purpose of the ensuing discussion is to outline the philosophical stance adopted by the study. Morgan and Smircich (1980) believe that theory development would benefit from the explicit disclosure of the nature of beliefs that underpinned studies. Mason (2002a: 5) and Silverman (2005: 7) affirm that translating philosophical perspectives into methods

helps to clearly articulate the essence of the enquiry, yet “trivial preferences” and “showcas[ing] ego-centric or confessional tales” should be avoided. Research paradigms are discussed as alternative views of the social world followed by outlining the ontological and epistemological positions through which the research is understood and designed.

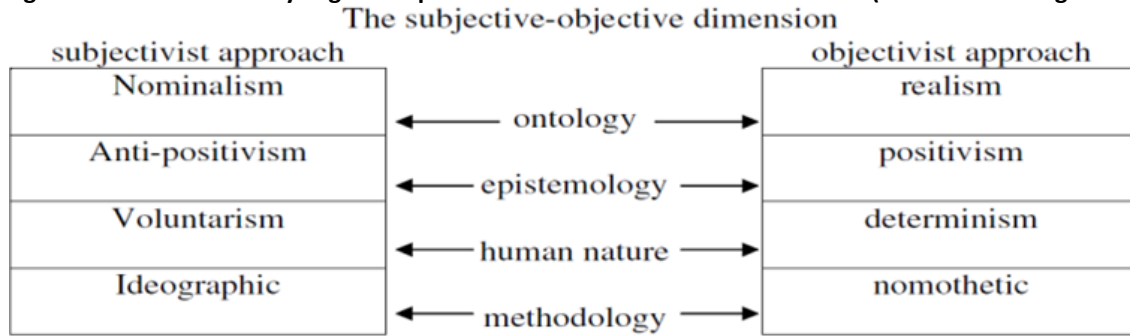
5.2.1 In search of paradigm

The collaboration phenomenon and the inherent processes as distinct elements of social science research are inherently complex, diverse and pluralistic, featuring a multitude of approaches to a study design (Sarantakos 2005). The questions related to the researcher’s understanding of ontology and human nature and epistemology have fundamental implications on the research design and methodological choices (Denzin and Lincoln 2000a). They influence how the research is conducted and guide the decisions regarding the choice of effective research methods:

“... the choice and adequacy of a method embodies a variety of assumptions regarding the nature of knowledge and the methods through which that knowledge can be obtained, as well as a set of root assumptions about the nature of the phenomena to be investigated...” (Morgan and Smircich 1980:491)

Burrell and Morgan (1979) provide a typography that categorises different metaphysical stances in two dimensions: the ‘objective’ – ‘subjective’ dimensions. The framework focuses on the conceptions of science. It considers the extent to which objective reality is believed to exist and the extent to which the nature of society can be viewed as consensual or conflictual, represented by ‘regulation’ and ‘radical change’ theories of society. By carrying implications about the type of methods researchers can utilise and the type of conclusions that can be drawn, the subjective-objective dimension informs the understanding of social science as follows: Ontology alternates between nominalism and realism, epistemology between anti-positivism and positivism, human nature between voluntarism and determinism, and methodology either adopts an ideographic or nomothetic theory (figure 5).

Figure 5: Scheme for analysing assumptions about the nature of social science (Burrell and Morgan 1979: 3)



Four “contiguous but... distinct” (ibid 1979: 23), incommensurable paradigms of social theory: functionalist, interpretive, radical humanist and radical structuralist, emerge from the matrix; each guided by its own principles regarding ontology, epistemology, human nature and methodology. Burrell and Morgan extend the paradigms embody “mutually exclusive views of the social world”. The distinct paradigms generate “theories and perspectives which are in fundamental opposition to those generated in other paradigms” (ibid 1979: viii).

The typography has however since been criticised as simplistic (e.g. Morgan and Smircich 1980; Laughlin 1995) and in need of revision in light of new theorising (Hassard and Wolfram Cox 2013), particularly due to its advocacy of incommensurability of paradigms (Donaldson 1985; Willmott 1993, Hassard and Wolfram Cox 2013). Willmott (1993) maintains that Kuhn intended the revolutionary process of scientific discovery and knowledge development entails “continuity as well as incommensurability”. It suggests that the scientific development of knowledge is marked by dynamism. “An accumulation of anomalies’ in existing theories stimulates (or supports) the plausibility and development of alternative theorizing” (ibid 1993: 683). There is a substantial, albeit never complete, overlap between paradigms:

“New paradigms do not parachute in from the skies. Rather, they arise out of process of social and intellectual struggle, often promoted by political and technological developments and contradictions within the wider structure of social relations, contradictions that stimulate critical reflection upon the plausibility of the assumptions underpinning established paradigms of knowledge.” (Willmott 1993: 688)

Willmott firmly rejects the mutual exclusivity of paradigms in progressing knowledge due to the dynamism inherent in the processes of developing theory and contends that notwithstanding the lack of 'isomorphism' in cross-paradigmatic interaction, "such communication is not only possible, but is a necessary condition of theory development" (ibid 1993: 688).

Accordingly, the proponents of the interpretive and critical frameworks define the paradigm as 'an absolute reference point' reached via social consensus. It represents a set of assumptions made up of "people's value judgements, norms, standards, frames of references, ideologies, myths, theories and approved procedures" (Gummesson 2000: 18) that guide action in the social world (Guba 1990). Scientific fields reflect the shared metaphysical stance of the related research community, where the communal "normative beliefs... provide a value-based rationale for action" (Hassard and Wolfram Cox 2013: 6). As maintained by Hassard and Wolfram Cox (2013: 7), "albeit the paradigm terrain remains relatively stable, constituent research communities change over time, through physically contracting and expanding, or else intellectually developing their theories and methods". The dynamic nature of paradigms renders the notion of absolute truth in social science redundant. Differences in social actors' thinking and actions, as well as the evolving nature of normative principles in scientific fields, driven by theoretical diversity, help to advance knowledge. Paradigms are, therefore, "analogous to 'field' whose habitats are circumscribed by indeterminate 'edgelands'", rather than "impenetrable 'citadels'" (Hassard and Wolfram Cox 2013: 7).

Burrell and Morgan's (1979) typography is helpful in presenting a comprehensive account of the issues related to studying social phenomena, and the following section discusses the criteria raised in the typography. Specifically, the focus is on the subjectivist-objectivist debate in the theory of society to include the assumptions about ontology and human nature, epistemology and methodology.

5.2.2 Ontology and human nature – the essence of being and the model of a human being

Assumptions about ontology and human nature underpin social theorising (Morgan and Smircich 1980; Denzin and Lincoln 2000a). Ontology governs subsequent epistemological and methodological assumptions (Sarantakos 2005). Although Burrell and Morgan regard human nature as conceptually separate from ontological thought, later theorising considers the assumptions about human nature as part of the ontological principles (Morgan and Smircich 1980; Denzin and Lincoln 2000a). Nascent poststructural and postmodern thought deems “human subject... relationally ‘decentred’ as the locus of understanding” (Hassard and Wolfram Cox 2013: 1711).

The basic premise behind ontology is whether the reality under inquiry can be considered dependent on the researcher’s cognition, actions and interactions – a nominalist position – or external to it, ‘out there’ waiting to be ‘discovered’ – a realist stance (Burrell and Morgan 1979). The nominalist or what is nowadays readily referred to as a relativist position, aligns with the subjective stance, and is in direct contrast with the realist position which occupies and advocates the objectivist position. Human nature considers the degree to which the environment determines people’s decision making. The contrast is made between a mechanistic response where people are “conditioned by their external circumstances” (Burrell and Morgan 1979: 2) and a position that sees human beings exercising ‘free will’ when creating their environment, distinguishing between objectivist-laden determinism and subjectivist-informed voluntarism, respectively.

Realists are firmly committed to ‘scientific monism’ (Anderson 1986: 167). Reality is perceived as simple and fixed, existing outside people’s minds. People are rational and their conduct is governed by social laws beyond their reach or influence. Relativism on the other hand advocates the existence of multiple realities, relative to their specific contexts and constructed from the perspectives of social actors who exercise free will in their construction. No objective reality or truths exist. Reality is produced in social interaction and is constantly in flux and conditioned by social actors (Charmaz 2000).

The shortcomings of the binary divisions are recognised in Morgan and Smircich’s (1980) reconstruction of the subjective-objective dimension that offers a more blended approach. Placing the different assumptions researchers hold about human nature and the nature of

reality along a continuum, six positions are categorised as reality and human nature that is (starting with extreme subjectivism):

- Projection of human imagination, humans as transcendental beings
- Social construction where humans create their realities
- Symbolic discourse, humans as social actors
- Contextual field of information, humans as information processor
- Concrete processes with humans as adaptive agents
- Concrete structure positioning humans as responding mechanisms

The worldview adopted here reflects the relativist thought: “meanings do not exist before a mind engages them” (Cooper 1998: 8). Even if some phenomena in the social world may appear as objective realities, such as the fact that Admiral sponsors the Mardi Gras in Cardiff, they are conditioned by the actions and interactions of the individuals involved. Consequently, a constructivist standpoint underpins the study, but it entails some aspects of the symbolic discourse where the “social world is embedded in the network of subjective meanings that sustain the rule-like actions that lend it enduring form” (Morgan and Smircich 1980: 494). This is largely at odds with the ‘shared philosophical stance’ incumbent in the strategic marketing and management field, dominated by the objectivist extreme (Gephart 2004). However, the complex environment in which arts-business collaborations exist has resulted in an increasing incorporation of subjectivist informed studies to further knowledge. The field has joined the ‘quiet methodological revolution’ alluded to by Denzin and Lincoln (2005: ix).

5.2.3 Epistemology – the grounds of knowledge

Epistemology stems from the chosen ontological assumptions and concerns the philosophical questions of what can be understood as or what constitutes knowledge. Blaikie (1993: 6) defines epistemology as:

“... claims about how what exists may be known... it is a theory of knowledge; it presents a view and a justification for what can be regarded as knowledge – what can be known, and what criteria such knowledge must satisfy in order to be called knowledge rather than beliefs.”

It addresses the position of the researcher in relation to the “objects” of their enquiry. Morgan and Smircich (1980) maintain that along the subjective-objective continuum, assumptions regarding the principles of adequate knowledge alter, reflecting the relevant ontology. The extreme ends are fronted by the positivist theory that addresses reality through the realist ontology. Knowledge, which is objective, is derived according to the teachings of empiricism where rigorous empirical testing of hypothetical-deductive models based on existing facts is the sole bona fide scientific method (Hanson and Grimmer 2007). Positivism rules out subjective experience unless rendered observable through sensory experiences (Bryman 1988).

In contrast, the phenomenological perspective encompassed in the interpretive paradigm (Burrell and Morgan 1979) advocates feelings and understanding. Understanding the social world from the participants’ viewpoint takes precedence as suggested by Shaw (1999: 60):

“The human subjects of the social world possess the ability to think for themselves, comprehend their own behaviour and have an opinion about the social world of which they are a part.”

Knowledge construction requires a collaborative interpretive understanding of social action and its actors within the naturally occurring environment (Denzin and Lincoln 2000a), whilst remaining reflexive as to the inherent subjectivities of the researcher. The researcher and the researched engage in intersubjective experiences, i.e. they interact and shape one another. Researchers can only attempt to gain insights and provide interpretations and descriptions of an individual standpoint, with a view of yielding information that can prove useful for others (Hanson and Grimmer 2007).

5.2.4 Research design implications of the philosophical assumption

Burrell and Morgan's (1979) typography 'delimits' the philosophical standpoint here within the interpretive paradigm. Social reality is emergent in social processes and interpreted by human actors through the processes of human action and interaction (Burrell and Morgan 1979; Morgan and Smircich 1980). People's action is largely volitional, yet the pressures of conditioning existent in society have resulted in a status quo where certain 'isomorphic' behaviours can be observed (DiMaggio and Powell 1983). However, these are an outcome of human interaction that constructs a certain reality rather than being innate in societal make up. In this study, volition forms a significant part of the conceptual framework, as will be introduced in the conceptualisation. Within the interpretive paradigm, the researcher needs to engage directly with the studied phenomenon and its actors to gain a depth of 'understanding' - *Verstehen* - of people and their behaviours to provide interpretive understanding of social action (Weber 1947).

However, multitude perspectives of knowledge mirrored in the different research strategies used to develop NPO-business collaboration knowledge exist. The different perspectives enrich knowledge with different insights (Willmott 1993). The body of research in cross-sector collaboration is weighted heavily towards the objectivist frameworks, yet these theories influence the adopted interpretive constructivist standpoint (Denzin and Lincoln 2000a). Therefore, the philosophical stance only informs rather than determining it. Apart from reflecting the researcher's values, the mode of enquiry must be informed by the status of field discussed in the next subsection to ensure that the theory developed is pertinent to some notion of reality.

5.3. Status of the field

The review of literature presented in the previous chapters has shown an immature research area, ill-equipped for theory testing. Literature is scattered across many different disciplines of the social sciences. It is imbued with contradictions, a lack of agreement and the proliferation of 'novel' concepts that resemble the "emperor's new clothes" (Seitanidi and Ryan 2007: 258) to escape the conceptual disagreements (Gond and Crane 2010).

Moreover, since the aim was to explore how cross-sector partners coming together creates positive results for society, apart from the motivations linked to my personal beliefs and experience, the arts context was selected due to its reported potential for social and economic betterment. However, value creation in the arts appears to be distinct in other, less relational contexts that is likely to bear on how societal value emerges. Having noted its omission from collaboration research, insights gained from this under-explored area, despite its proliferation in praxis, may result in gaining understanding that may be concealed in other contexts.

The relational underpinnings of artistic value creation demands beneficiary engagement for value to emerge (Boorsma 2006) that is different to value being created for beneficiaries in other settings. The lack of focus on arts based collaboration in extant literature thus presents difficulties in applying existing frameworks for analysing value creation through NPO-business collaboration in the arts context. Frameworks are typically constructed through a synthesis of existing studies (e.g. Austin and Seitanidi 2014) that in the case of the arts context overlooks the relational perspective. Contextual sensitivity thus indicates that considerably more potential for enriching knowledge is evident in “inquiry from the inside” (Evered and Louis 1981) than from the detachment and neutrality of quantitative strategies (Van de Ven 2007).

The underdeveloped study topic and ‘novel’ context called for research tactics that enable the researcher to ‘hang out’ (Wolcott 2009) with individuals who directly participate in the setting to explore and gain an understanding of ‘what is going on’ as they understand it, whilst also observing it first-hand (Janesick 2000). This has significant implications on the methodological approach the study needs to adopt, as will be discussed in the next section.

5.4 Methodology

Adopting a specific philosophical stance and the exploratory and descriptive aims imbued in the status of the field has implications on methodology. Denzin and Lincoln (2000a: 10) outline the differences between the two leading methodologies – qualitative and quantitative – based on the different ontological and epistemological assumptions:

“Qualitative researchers... are committed to an emic, idiographic, case-based position, which directs their attention to the specifics of particular cases... [whereas] quantitative... seek a nomothetic or etic based science based on probabilities derived from the study of large numbers of randomly selected cases.”

Accordingly, the study informed by interpretive constructivism aligns epistemologically with qualitative methodology. This is due to the synonymous understanding that people participate in knowledge production and because the researcher needs to enter the field as an instrument of knowledge creation rather than considering them an ‘intervening variable’ (Flick 1998: 6). Bryman and Bell (2011) further remark that in qualitative research, theoretical frameworks emerge from the fieldwork experience. The relationship between theory and research employs an inductive logic, compared to the deductive imbued in positivist studies. However, Miles and Huberman (1994) see a link between inductive and deductive approaches, and Patton (2002: 253) describes the process thus:

“As evaluation fieldwork begins, the evaluator may be open to whatever emerges from the data, a discovery or inductive approach. Then, as the enquiry reveals patterns and major dimensions of interest, the evaluator will begin to focus on verifying and elucidating what appears to be emerging, a more deductively oriented approach...”

Bryman and Bell (2011) believe that an ‘iterative’ approach best describes the processes of developing conceptual frameworks in studies grounded in data. Inductive reasoning is combined with elements of deduction. Jenkins and Conley (2007) utilise this approach in a case study based on research design where the subject was under-researched to allow for the conceptual framework to develop during the research process. The iterative approach relates to abductive thinking and Reichertz (2010) links this with the theoretical strand of grounded theory (Strauss and Corbin 1994). The iterative approach to theory building further supports the exploratory and descriptive aims of this research.

5.4.1 Research strategy and methods

With the qualitative approach defined as the guiding methodology, the overarching methodological considerations need to be outlined. Primarily, a multi-method interpretivist inquiry is used as it allows theory building from multiple sources over a period of time (Braun and Clarke 2006). Indeed, a key strength of constructivist interpretive research is the range of methods that can be used. This study employed a case study which was corroborated through a separate study utilising cross-sectional qualitative interviews as outlined in the following subsections.

5.4.1.1 Case study use

This subsection outlines how the case study method was approached here. Case studies are particularly useful in qualitative research as they help to draw out new insights on phenomena, which can significantly enhance existing knowledge on a topic (Lincoln and Guba 2000; Yin 2003; Perry and Gummesson 2004). Yin (2003:13) defines case study research as:

“... an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident... [using] multiple sources of evidence with data needing to converge in a triangulating fashion...”

One of the key decisions that has attracted widespread debates (Eisenhardt (1989; Dyer and Wilkins 1991; Gummesson 2000), is whether to focus on a single case or utilise a multiple case study approach (Yin 2003). Although neither strategy can claim superiority, Eisenhardt re-iterates her position that multiple cases result in more ‘parsimonious, robust and generalisable’ theory as the analytical framework is based on more varied empirical evidence (Eisenhardt and Graebner 2007: 30). Dyer and Wilkins (1991) and Gummesson (2000) contend that the key strength of case study research is the opportunity to provide a holistic view of a specific process/phenomenon. Focusing on one case is sufficient, as the

benefit of a depth insight gets diluted in multiple cases. The ‘thin descriptions’ produced by multiple cases may “provide a distorted picture, or no picture at all, of the underlying dynamics of the case” (Dyer and Wilkins 1991: 615). Stake (1995: xi) concurs and argues for holism:

“Case study is the study of the particularity and complexity of a single case, coming to understand its activity within important circumstances.”

Van de Ven (1987) comments that a fixation with outcomes in positivist informed studies typically marginalises the influence of processes and context. This means that we only “scratch the surface” of social phenomena (Hill and Wright 2001: 435). Context and history form the key factors that shape and are shaped by social processes (Van de Ven 1987; Stake 1995; Pettigrew 1997; Daymon and Holloway 2002). Giving readers a detailed account of the setting helps to improve the understanding of the case.

“... [it] may constitute a complex entity in itself and therefore the very process of [examining] that thing involves observing part of its underlying complexity and the sub-things that constitute it... [requiring] oscillat[ing] between the thing identified... and both its constituent elements and the context in which it is sitting.” (Angell and Demetis 2010: 133)

Deciding on adequate supportive evidence and particularly selecting a case “we feel we can learn the most” from is fundamental (Stake 2000: 446). In academic research, this decision tends to involve the constraints of access, and time and resources (Bryman and Bell 2011).

Since the aim was to gain a holistic perspective of how collaboration between arts and business organisations creates value for society in a specific context, the superficial contact with a number of cases was insufficient to provide the required analytical depth. The choice of a longitudinal study of IMS was initially informed following a Master’s dissertation research. With a broad idea of the research problem in mind, I asked the managers to recommend projects they considered helpful to my research. I explained that the focus was on relationships between arts and business that involves social objectives. Two projects were repeatedly pointed out, both of which were described as highly

successful having been formally recognised by A&B as exemplary. Despite a familiarity with and access to one of the projects, it was subsequently pragmatically discounted. As uttered by Smith and Osborne (2008: 56), the decision of who will be included in any research is always partly defined by “who is prepared to be included in it!” whether through choice or circumstances.

Furthermore, to ensure that IMS was a substantially information rich case (Stake 1995), I gathered information through publically available sources (Stake 1995)⁴. An overt collaborative approach to the organisation’s strategy was clear from external stakeholder communication materials:

“It’s My Shout could not exist without the partnerships we have forged and developed over the... years. We pride ourselves on the individuality of each and every partnership at every level...” (IMS 2009)

It later transpired that collaboration did not always underpin the strategy. The initial contacts with the private sector were regarded as providing additional resources to improve the ability to serve the target audience. My understanding of the information gathered is that this overt shift towards collaboration as an organisational strategy emerged on the back of the devolution from the local authority that occurred between 2006 and 2007. It was adopted to ensure fiscal and professional sustainability. In my opinion, this shift and the initial formation of the unique scheme link with the supportive external environment in Wales.

During the 1990s, in an effort to diversify the economy following the decline of heavy industries, the Welsh Assembly Government (WAG) authorised a range of cultural policies to develop alternative provisions. The alternative provisions were aimed at addressing growing social problems caused by youth unemployment that reached 39% in some areas of South Wales (Walkerdine and Jimenez 2012). The creative sector was identified by the WAG’s economic development strategic consultation (Wales: A Vibrant Economy) as a key sector in “the future of the Welsh economy” (WAVE 2005: 15). IMS was established by one of the affected local authorities on the back of the WAG’s agenda. The

⁴ See appendix 3 for breakdown of secondary documents used in study

Economic Impact of the Arts and Cultural Industries in Wales report showed that Wales ranks amongst the highest in employment in the arts and cultural industries in the UK (CC 2006). In my opinion, the supportive macroenvironment in Wales facilitated the transition towards collaborative strategy during the devolution process. The private sector incorporated the WAG's cultural directive as part of the community engagement strategy. Extant literature indeed considers political motives as a driver of CCI in the arts context (O'Hagan and Harvey 2000; Moir and Taffler 2004). Similarly, Pettigrew (1997) recognises the impact of outer contexts on the organisation level processes.

The internal context of IMS further confirmed an information rich case to examine how collaboration between arts and business creates value for society. IMS has been recognised as an example of best practice both in Wales and UK-wide by the UK's government and a significant contributor to development of the creating industries (DCMS 2011: 72). As societal value creation developed through collaboration with business was of primary interest, the suitability of IMS was considered by noting the existence and influence of its portfolio of business partners. The innovative and diverse relationships with businesses developed after the devolution from the local authority have been acknowledged by Arts and Business⁵ through a variety of awards given to IMS and its business partner⁶.

The extent to which the material at hand indicated that the specific relationships, whether recognised externally or not, contributed to the ability to generate societal value was used as a criterion for inclusion in the case study. Many partners engaged with the schemes purely for instrumental reasons as an effective approach to securing practical training for their students. This was the case for all the creative training partners. Their inclusion in the case study itself is justified through the effort to incorporate the 'important circumstances' (Stake 1995) and 'subthings' (Angell and Demetis 2010) that contributed towards IMS's ability to generate societal value through collaboration with its corporate partners. Although all business relationships were transactional, and heeding the advice of

⁵ Arts and Business is the leading consultancy for developing relationships between the arts and business sectors in the UK

⁶ IMS was awarded the top prize for an arts organisation, the Legal and General Arts Award, at the Arts and Business Cymru (Wales) Awards 2008 for its work with a variety of business partners. Concurrently, ITV Wales won the best business partner award for its work with IMS. In 2009, Barclays Bank won the Arts, Business and Young People category for its collaboration with IMS in developing a money management programme for young people

Fielding and Fielding (1986), transactional hybrids were given the most scope. They provide the most information rich data to answer the research objective of how transactional collaboration creates value for society.

IMS was not selected as a 'sample of one' based on its representativeness and wide-ranging generalisations, but as 'the unique case' (Stake 1995: 1-13). In the absence of a pertinent analytical framework, IMS was selected to develop a holistic understanding of value creation for society in an arts organisation (Pettigrew 1997). This developed to a large extent thanks to the help of a variety of both, short- and long-term transactional relationships with business.

5.4.1.2 Triangulation – crystallising the view

"Our truth is the intersection of independent lies." (Levins 1966: 423)

Triangulation constitutes a way to "verify the repeatability of an observation or interpretation" (Stake 2000: 443), but this has been contended by some constructivist interpretive researchers as reflecting positivist quality criteria. Fielding and Fielding (1986) affirm that convergent validity is seldom a concern for qualitative researchers as they typically embrace multiplicity of social reality. Denzin and Lincoln (2000a: 5) conclude that combining "multiple methodological practices, empirical materials, perspectives, and observers in a single study is best understood... as a strategy that adds rigour, breadth, complexity, richness and depth". Triangulation moves case research towards a holistic portrayal of the studied situation (Jick 1983; Fielding and Fielding 1986). Richardson (2000: 934) talks about crystallisation to better reflect the multifaceted nature of qualitative approach:

"... Crystals grow, change, and alter, but are not amorphous... crystallization provides us with a deepened, complex, thoroughly partial understanding of the topic..."

Denzin (1989) extends four categories of triangulation: data, investigator, theory and method triangulation. Janesick (1994) argues for 'interdisciplinary triangulation' as a way of preventing methodological hegemony incumbent in different disciplines. Methodological

triangulation through a multi-paradigm approach can produce new forms of understanding and, therefore, progress the field of business studies (Willmott 1993; Flick 1998), yet combining methodologies remains disputed. Silverman (2001) raises the problematic nature of combining methodologies in constructivist informed methodologies. The approach adopted here resonates with Richardson's (2000) method of crystallisation rather than looking for convergent validity. The grand design combines the crucial aspect of any research: 'asking questions', 'hanging out' and 'reading texts' (Dingwall 1997) as the forthcoming sections present.

5.4.2 Methods and modes of application

Case studies can be organised in a variety of ways, depending on the researcher's style and circumstances. Social realities are dynamic and the researcher's role in developing a case is to "catch this reality in flight" (Pettigrew 1997: 338). The purpose of any mode is to "exhaust the analyst's momentary ideation based on data with perhaps little conceptual elaboration" (Glaser 1978: 84) and to help organise the multifaceted dimensions into an "idiographic framework" (Patton 1990: 387).

The story of IMS will be presented chronologically. It traces the evolution of IMS through extensive cross-sector collaborations with the key events related to major evolutionary occurrences and collaborative efforts used as defining milestone in helping to understand societal value creation through collaboration in this setting (Pettigrew 1997). Stake (1995) and Pettigrew (1997) suggest that context and history form the key factors that shape and are shaped by social processes. "What the readers understand about [the case] should be considerably enhanced by the knowledge of the setting" (Stake 1995: 138). "Antecedent conditions shape the present and the emerging future." (Pettigrew 1997: 341). Therefore, the understanding is constructed by presenting a chronological case history, interwoven with occurrences in the "outer and inner contexts surrounding [IMS's] level processes" (Pettigrew 1997: 340).

Case studies, however, can be problematic in terms of validity and, therefore, tend to be relegated as an approach to formulating hypotheses (c.f. Yin 2003). The position within research design can also be problematic as some consider it as a comprehensive

research design (Yin 2003; Bryman and Bell 2011; Saunders et al. 2012), whilst others see it as a choice of what is to be studied. Daymon and Holloway (2002) consider the multi-method sources of evidence available to case researchers particularly instructive in attaining the much required depth that management research needs in order to move beyond descriptive understanding. Crane (1998) specifically recommends case studies for examining the phenomena consisting of a range of partnerships due to the various forms of triangulation option. Crane (1998) and Ryan (2006) utilise method triangulation to research the multifaceted nature of alliances with different value frames. Stake (1995) posits that all case study research begins with observation, whilst Wolcott (2009) considers all social research as observational. Case researchers typically employ 'observations, interview and document review' (Stake 1995: 114), which can be used individually (Ellson 2004) or in combination (e.g. Crane 1998; Ryan 2006).⁷

The thesis employed a case study as one of its methods and utilised crystallisation as a form of between-method triangulation to strengthen the empirical basis. The findings of the case study were 'crystallised' using a qualitative interview-based study. Different types of semi-structured interviews were employed. The individuals and organisations were drawn cross-sectionally, using purpose and snowball sampling. The aim was to identify informative participants rather than emphasising the representativeness of samples (Bryman 2008). Although Bryman and Bell (2011) primarily assign cross-sectional design as an approach to collect quantifiable data, it also owns a place in qualitative research. It allows the "collection of data on more than one case... and at a single point in time" (ibid 2011: 53). The different groups represent different constituencies that helped to refine the understanding of the case study findings (Richardson 2000). Due to the strength of the qualitative field, different types of interviews can be used to build a thick description of the world under inquiry (Fontana and Frey 2000). The next section outlines the specifics of how the data collection and analysis were conducted.

⁷ For a theoretical discussion of the individual methods, please see appendix 5.

5.5 Conducting the fieldwork and data analysis

This section informs the readers about how the data were obtained, provides rationalisation for certain choices as appropriate, and details the processes through which analysis was carried out (Wolcott 2009). The initial focus centred on the case study developed with the help of the people at IMS, as it forms the basis of the research design. The second study utilised different types of interviews with a variety of constituents identified in the case study. The approach to data analysis is specified for each section.

5.5.1. Case study

Multiple sources of evidence form the basis of the case study. Continual probing of data allowed a depth of understanding of how societal value creation is understood, constructed and reconstructed, through the interpersonal relationships and interactions between people who contributed to the evolution of IMS and its collaborative endeavours, whether intentionally or inadvertently. The case covers the developments from the initial inception on the cusp of 2002/2003 until January 2011, when the scheme re-positioned to become a recognised national training scheme. Overall, data collection included formal and informal interviews with the key protagonists, the employees and trainees at the scheme, the creative professionals and the main corporate partner. It also included formal and informal observations⁸, a preview and analysis of a large amount of documentary evidence about the operations of the scheme retained in the scheme's archive, as well as evidence obtained in the public domain. I was also supplied with the short films produced annually and an accompanying documentary in form of 'making of'⁹. All was recorded in fieldnotes. The data collection comprised of four phases:

⁸ See appendix 6 for schedule of interviews and appendix 3 for breakdown of observations

⁹ See appendices 3 and 7 for breakdown of documents

- Spring 2010: initial gathering of evidence in public domain followed by an initial meeting at IMS in May 2010
- Autumn 2010 – Spring 2011: internal documentary evidence, informal interviews, and formal and informal observations; formal observation in Autumn 2012
- Autumn 2011 – January 2012: formal interviews and observations, public and internal document and artefacts gathering
- Spring 2012 – Summer 2012: formal and informal interviews and observations; plus additional formal observations in October 2012 and October 2013

The initial familiarisation with the scheme started by gathering different forms of information in the public domain including newspaper articles, the scheme's website, as well as A&B annual awards brochures and website. This provided a wealth of information for familiarisation with the field. The initial contact with IMS was made in May 2010 with the help of a personal contact who supplied a contact for the Managing Director, Roger Burnell. The initial meeting took place in their office in Cardiff Bay, where I met both Roger Burnell and the Project Manager, Kylie Cornelius-Rees. I explained that the research examined relationships between arts and business where social objectives are pursued. I was provided with a very basic synopsis of the scheme and was offered full access.

I was granted full access to the archive of the scheme, although I was told that it wasn't very comprehensive, particularly in the early stages. This meant I was able to reconstruct a historical evolution of the scheme dating back to the inception. I was also invited to an annual showcase where supporters, trainees and friends of IMS preview the short films produced and awards are given to the best performing trainees. The only return on investment requested by IMS was a copy of the final thesis. It later transpired that our numerous conversations fashioned a form of an informal 'consultancy' service for the scheme.

Fielding and Fielding (1986: 50) recommend observations and initial meetings as instructive devices to gain a "first look" of the social setting. As the researcher becomes more sensitised, they gain better grasp of "what lines and leads are relevant before... the subtle task of encouraging the interviewee to be expansive on the interesting... but terse on the rest" (ibid 1986: 50). The archival analysis involved seven full working days spent in the

scheme's offices at Sony. The setting allowed some observations of the key corporate partner, although at this stage, no direct contact with people outside the scheme, bar the receptionist, occurred. As this was the only location for IMS, I was privy to numerous conversations and observed visitors to the scheme. I was always introduced as a researcher.

I focused on files that covered the relevant information, where each piece of document was read, and if deemed relevant, recorded for later analysis¹⁰. The chronological recording of the archive contributed a chronology to the synopsis. However, I consulted with Roger following the first day to structure the document recording better. This 'interview' formed more of a "conversation with a purpose" than a formal structured interview (Fontana and Frey 2000), yet I found the tendency for people to conflate past and present in their narratives reported in literature (Coffey and Atkinson 1996). Bryman and Bell (2011) recommend 'retrospective interviewing', a useful technique of finding out about how certain events influenced the evolution to the current situation. In combination with the subsequent observation of the showcase, attendance at the Ffresh conference¹¹ where Roger gave a talk about the scheme, and further archival analysis, the chronology began to emerge and was finalised in March 2011.

Following this stage, a prolonged struggle to focus the study produced a hollow period in fieldwork at IMS. Upon an 'aha' moment where I narrowed the research problem on societal value creation through arts NPO-business collaboration, the next phase of fieldwork began. I initially observed the showcase in October 2011 and followed it up with extensive interviewing with Roger and Kylie spread over two days, totalling close to three hours of recorded time. An interview guide in the form of 'memory prompts' (Bryman and Bell 2007) ensured that the areas of interest were covered. With many of the 'factual' and chronological elements to the case detailed in the synopsis, the interviews clarified some of the factual data from the documentary evidence and added richness and depth to the understanding related to benefits generation. Jovchelovitch and Bauer (2000) consider personal narratives not only capture the viewpoint, but also how it was constructed and what influenced it as perceived by the narrator.

I was also given video records of the films produced of the past two years and the documentaries. The sets of short films produced from 2008 until present were available on

¹⁰See appendix 7 for files and documents previewed.

¹¹ Ffresh – Student Moving Image Festival in Wales; <http://ffresh.com/en>

the website and also shown on ITV Wales and BBC Wales, respectively. Although these materials provided more depth to the understanding, they were considered as reproductions of the reality that served the promotional aspect of the scheme. Van Maanen (1979: 542) deems representational data "appearances that informants strive to maintain (or enhance) in the eyes of the fieldworker, outsiders and strangers in general, work colleagues, close and intimate associates, and to varying degrees, themselves". I also engaged in numerous 'spur of the moment' informal chats with trainees about their experiences of participating in the scheme throughout my presence at IMS. The documentaries previewed also provided these insights. It was becoming apparent that the enthusiasm of the young people and drive to succeed were instrumental in creating social value.

The archival and public documents and artefacts were fundamental in providing another "look at the same situation" (Fielding and Fielding 1986: 25), yet the in-depth interviews clarified the processes and relationships that underpinned the outcomes of collaboration. I was also able to probe how value was understood, who were seen as the recipients of the value created and how the business partners contributed. At the end of the interview, I asked Roger and Kylie to order a set of benefits for society typically associated with arts organisations to gain a clear picture of the societal aspect of collaboration reported lacking in extant literature (Austin and Seitanidi 2012a).

5.5.1.1 Analysis

The case analysis was informed by Stake's (1995) assertion that: "new meanings about cases are [reached] through direct interpretation of the individual instance and through aggregation of instances until something can be said about them as a class". Dyer and Wilkins (1991: 613) explain theory construction in interpretive inquiry as "the telling of good stories" (Dyer and Wilkins, 1991:613). Stake (1995: 127) contends that reporting a case study is more complex than storytelling. In Stake's view, Van Maanen's categorisation (1988) of the 'realist tale', 'confessional tale', and 'impressionist tale' describes the process more eloquently (Stake 1995: 127-128). The tale told here follows the realist path, providing

a direct portrait, yet it is entwined with the impressionist one giving personalised accounts of the field in the following fashion.

The narrative is structured around events and people who were deemed influential on the understanding of value creation through collaboration with business. It features commentary that reflects my experience of the situation, as interpreted through my normative beliefs but it gives a voice to the key individuals who enact this reality in an attempt to bring them to life through the narrative (Corden and Sainsbury 2006). Interpretivist analytic procedures guided the analysis, but no single specific method was strictly observed to avoid missing insight due to methodolatry laden approach (Janesick 2000). The analysis adopted a more 'emergent' approach that reflected the exploratory nature of this phase and the data collected, as well as my analytical skills and time constraints inherent in doctoral research (Mintzberg, 1979). McKee (2003) advises that analysis does not necessarily denote scrutinising the text in minute detail; what is needed is for researchers to "pick out the bits of the text that, based on your knowledge of the culture within which it's circulated, appear to you to be relevant to the question you're studying" (ibid 2003: 75).

Data was analysed and interpreted iteratively, guided by constant comparative method where data collection and data analysis proceeds simultaneously. Reichertz (2010) refers to this approach to analysis as abductive research logic. In the abductive process, the first step is the qualitative induction that entails an intellectual jump which states that *"things in common between acquaintance and data and codes in already known concepts"* (Reichertz 2010: para 35). The second step is the *"intellectual jump which adds something very new to the data, something that they do not contain and that does not already exist as a concept or theory either. This is abduction."* (ibid 2009: 35). Braun and Clarke (2006: 81) suggest using thematic analysis as a specific method for identifying and interpreting patterns across data sets where a researcher "need not subscribe to the implicit theoretical commitments of grounded theory if they do not wish to produce a fully worked-up grounded-theory analysis". Following familiarisation with the data and transcription of verbal data, initial codes are generated based on identifying features of the data the researcher deems interesting or important. The codes are then sorted and collated into themes and sub-themes (Braun and Clarke 2006). The data displays are then interpreted through a process of constant comparison of emerging themes with subsequently collected

data, and by relating them to extant theories and concepts in pertinent literature. The researcher then proceeds to make sense of the similarities and differences that enable him or her to spot patterns and derive further themes. Summaries are built from thick description (Denzin and Lincoln 2000a).

The public and archival documents were used to develop a chronological synopsis of the case. It reduced the initial data set and served as 'initial' coding. The initial broad themes were then related to pertinent theory. The themes guided the interviewing and observations, whilst ensuring that serendipity was not stifled by strict adherence to them. Whilst retaining the chronological account, the process involved moving iteratively between the formal interviews and informal conversations with the people at IMS, the observation of events, previewing recorded materials as and when they emerged, and theories identified in literature. Coupled with my personal understanding of the field, the abductive thinking helped refine the themes around which the preliminary case study was structured. These centred on the chronological developments, the different types of relationships that emerged during the different stages, and the individuals and occurrences that influenced them. The initial draft of the narrative was emailed to the scheme for approval. Subject to minor corrections (names, details of some events), the manuscript was signed off as 'a highly detailed and accurate account' by Roger Burnell in April 2012.

With the initial thematic frame established and the insights it offered, in consultation with extant literature, the focus was narrowed to societal value generated with business partners. This necessitated a re-structuring of the initial narrative around the notion of societal value creation. The re-structured narrative indicated a need for further clarifications and the incorporation of novel notions that had arisen in light of the pertinent literature. Particularly unclear were the insights into the benefits flow between the individual and organisational levels. This warranted further observations and interviews with the managers at IMS, as well as with the key corporate partner. The iterative process was repeated with the new data, with the interviews analysed using the emergent thematic frame. Again, care was taken to ensure that new insights were noted down in order to refine the thematic framework. The case study was updated according to the insights and a number of propositions forming the conceptualisation of the case study were derived.

The preliminary conceptualisation features commentary that reflects my experience of the situation, as interpreted through my normative beliefs. An explicit voice is given to

the key individuals who enact this reality in an attempt to bring them to life through the narrative (Corden and Sainsbury 2006; Smith and Osborne 2008). My normative perspective undisputedly influenced the analysis of all three datasets. Czarniawska (2002: 747) depicts “every reading as an interpretation... there is no one thing that a researcher must, should, or can do... Much more important than a specific interpretive or analytic technique is the result – an interesting recontextualization.” The themes that guided the conceptualisation were renderings of the social reality as I experienced it, informed by my participants and interpreted by me.

However, in drawing out the propositions for the initial conceptual framework, I became dissatisfied with the cogency of the data that underpinned some of the propositions. The propositions about different categories of individuals and groups, albeit partly constructed using observations and informal chats with them, as well as the video documentaries, were derived largely through perceptions of the managers in the partnering organisations. These insights provided cogent information related to the organisational level of analysis as the managers commented on the positive organisational outcomes. It also indicated a potential interface between the individual and organisational level of analysis where the managers commented on their improved skills and understanding progressing the organisational learning. However, I was conscious that the interview with the corporate partner was marked by a lack of knowledge of the strategic aspects due to the relative juniority of the informants. The case further raised a range of individual beneficiary groups that may contribute to positive organisational and societal outcomes, to include the employees, the artists and target beneficiaries. How these benefits emerge and transfer within and across the different groups and levels of analysis was not clearly evident from the data. The lack of perceptions from constituents other than managers partaking in the construction of this social reality was also one of the key issues raised in extant literature (e.g. Pelozo and Shang 2011).

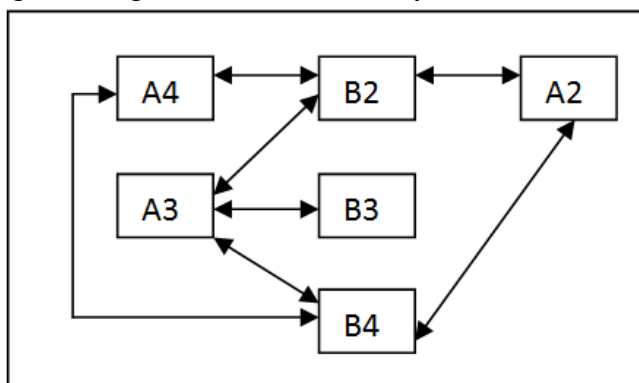
Moreover, the insights were highly idiosyncratic to IMS. Although representativeness was not of primary concern, the narrow artistic focus of IMS called for the refinements of the propositions through a wider array of performing arts genres “to shed light on the emerging theory... identify conceptual boundaries and pinpoint the fit and relevance of our categories” (Charmaz 2000: 519). Cross-sectional in-depth interviewing of the identified beneficiary groups within a range of collaborating corporate and nonprofit community arts

organisations was merited to gather further data. The aim was to refine the links between the different levels of analysis to help determine how societal value emerges. The next section outlines how the second study was conducted.

5.5.2 Interviews

With the conceptual framework in mind pointing to participants/audiences, the arts organisations, businesses, employees and artists, the relevant respondents were theoretically sampled. Again, pragmatically, existing contacts were used as suggested by Fielding and Fielding (1986: 48) “...who is interviewed, at what stage... and in what manner is decided by the researcher’s state of knowledge and judgement as to how it could be extended”. Rather than a wide cross-section or representative samples, the depth of insight required rested within subsets of existing collaborative arrangements. Resembling a snowball sampling (Bryman 2008), Patton’s (1987: 51) advice that selecting respondents should be led by “what unit it is that you want to be able to say something about”, reflects this method. All individuals and respondents were based in South Wales, except for one organisation that operated in the north of England. A web of interacting organisations emerged. They were either directly engaged in collaboration or indirectly associated through a collaboration partner. Figure 6 shows a fragment of the inter-relationships.

Figure 6: Fragment of interconnectivity between interview organisations – direct engagement



The process started by asking for a second round of interviews with Kylie and Roger at IMS and their help was solicited in organising an interview with the main corporate partner. I then contacted individuals at companies and organisations that were known to

me to be engaged in socially oriented collaboration from prior research. Access was negotiated to two businesses where the managers agreed to be re-interviewed. They also mediated access to their colleagues and allowed me to speak to their employees. The business managers provided emails of the contacts at the arts organisations and/or helped mediate access. Soliciting emails were sent immediately after. Mentioning the business partner was helpful in gaining access.

The sampling strategy resulted in 39 individuals participating in 27 separate interview sessions of which three were follow ups. All interviews were face to face apart from one which was conducted over the telephone. This person was previously interviewed in person for the Master's research. As the interviews progressed, it became apparent that most of the organisations had or used to have an affiliation with a specific consultancy group, which was subsequently added to the set. Each participant was informed of the purpose of the research, albeit not of the purpose of the second phase of data collection to avoid participants feeling that they needed to conform or contradict the interim findings. The consent form was read out and signature was requested (see appendix 10). Anonymity was also offered, with the majority declining. However, to observe other people's preferences, each person and organisation was assigned a code (see tables 7a, b, c, d for coding system). Consent to recording and note taking was given by all participants. The interviews lasted between 30 and 152 minutes of recorded time, with the shortest being the telephone interview and the longest the previously mentioned business recommended for explicit social objectives. On this occasion, four members of the community relations team attended. On three occasions I was met with a group rather than the anticipated single interviewee. To avoid tension and offence, as well as to avoid losing the additional insight, I adjusted accordingly. As proposed by Frey and Fontana (1991), situations where a diversity of opinions can be reasonably expected justify group interviews to allow for the construction of the reality to emerge more naturally through group dynamics.

Table 7: Coding System Tables

T7a: Business and Arts Organisations Interviews Coding System

Code	Sector	Interviewee Job Title	Reporting Line	Length of Experience
B1	Manufacturer of high definition products	a) PA and CSR Manager	CEO	2 years (CSR)
		b) Education Media Solutions and CSR Manager	CEO (CSR related)	2 years (CSR)
B2	Insurance Services	a) Head of People Services	CEO	4 years (1991 overall)

		b) Head of Communications	CEO	13 years
		c) Communications Manager	Head of Comms.	13 years
		d) Communications Officer	Head of Comms.	5 years
B3	Financial Services Group	a) Community Affairs Manager	CEO	over 20 years
		b) Communities Affairs Executive	CAM	22 years overall
		c) PA to CAD, Volunteering Programme Co-ordinator	CAM	since 1999 overall
		d) In-house researcher	CAM	2 years
B4	Insurance Services	CSR Manager	Senior HR Manager & Group CSR Mngr.	15 years in Wales
B5	Banking	Community Investment Manager	Head of Community Investment	9 years in current position
B6	Building Societies	Sponsorship & Events Manager	Corporate Comms Manager => CEO	7 years in current position (over 30 years overall)
A1	Community arts organisation (film and media training)	a) Managing Director – Owner	n/a	11 years
		b) Projects Manager	Managing Director	10 years overall
A2	Multi-artform community arts centre (professional and community)	a) CEO	board	1 year
		b) Director of Marketing and Community Engagement	CEO	23 years
		c) Head of Development	CEO	5 years
A3	Multi-functional community arts centre	a) Theatre and Arts Director	City Council Head of Leisure	8 years
		b) Marketing Manager	Theatre and Arts Director	8 years
A4	Contemporary circus company	Executive Director	Board	6 years
A5	Professional Community Theatre	Head of Development	Director	5 years
A6	Professional and Community Theatre	a) Administrative Director	Board	19 years in the same position
		b) Publicity and Fundraising Officer	b) Administrative Director	4 years

T7b: Participants Interviews Coding System Coding System

Code	Gender	Age group	Socio-economic status ¹²	Type & arts group affiliation
DK	male	25-44	4	audience A2 & participant A4
JR	male	25-44	1	audience A2
CR	female	25-44	1	audience A2
BC	male	25-44	2	participant A4
MH	female	25-44	1	participant A4
FL	female	25-44	1	audience A2
RL	female	18-24	1	audience & participant A4

¹²Social classification: 1 – higher managerial, administrative and professional occupations; 2- Intermediate occupations (positions in clerical, sales, service and intermediate technical occupations that do not involve general planning or supervisory powers; 3 – routine or manual occupations; 4 – self-employed; * never worked and long-term unemployed.

LR	male	25-44	4	audience A4
AH	female	25-44	1	audience & participant A2, A4
O	female	45-64	1	audience & participant A2
LJ	male	25-44	1	audience A2
T	male	25-44	4	audience A2
A	male	25-44	4	participant A1
VS*	female	18-24	2	participant A1

T7c: Employees Interviews Coding System

Code	Gender	Company	Job title	Length of service
JW	male	B2	Sales Rep. and Team Aid	2 years
JC	male	B2	Senior Claims Rep.	2 years
B2d	female	B2	Comms. Officer	5 years
GS	male	B2	Media Content Develop. Officer	2 years
HW	female	B2	Communications Administrator	7 years
SG	male	B2	Sales Rep.	2 years
VS*	female	A1	Community Projects Coordinator	18 months
A1b	female	A1	Project Manager	10 years overall
PR	male	B4	Head of Department	13 years
MP	female	B4	Underwriting Cust. Develop. Manager	23 years

T7d: Artists' Interviews Coding System

Code	Gender	Company	Job title	Length of service
LE	female	A1	Mentor	6 years
ML	male	A1	Mentor	4 years

An interview guide was used across all interviews. I was mindful to tailor it to each subgroup, as well as the individual interviews to reflect the relationships across the subsets¹³. The business interviews started by asking the manager to reflect upon the role of business in society, whereas the arts organisations were asked how the arts or their organisation benefited the society. Facesheet information was collected from all participants. The questions were oriented towards finding out who the subsets considered as beneficiaries and how they benefited, rather than directly soliciting opinions on 'value creation'.

The different subsets naturally focused on areas relevant to them. The interview guide was altered as the data collection progressed or if a particular question was

¹³ See appendix 8 for a generic interview guide for each subset

repeatedly found too broad or out of place. For example, I initially asked both the arts and business managers how they perceived the role of business in society. This was subsequently refined to seek their perceptions of the responsibilities of the business, and again later making a distinction between obligations and responsibilities. Although the interviews were steered to cover most of the topics of interest, participants were allowed the freedom to diverge to areas they perceived notable. I closed the interviews by summarising my understanding of what had been said and the interviewees were invited to add anything they thought was relevant. By enquiring about the correspondence in understanding, a monologic view of the reality, constitutive of the subjective realities of the researcher and the interviewee, was allowed to emerge (Atkinson and Silverman 1997).

I then considered the data collected in my Master's research as a further source of information as they focused on the benefits that businesses sought from collaboration with the arts to gain insight into their motivations. Six interview transcripts representing the views of nine individuals comprising four businesses and two arts organisations were added to the data set. Two of these individuals represented those who were re-interviewed. Overall, the dataset consisted of six arts organisations, six businesses, ten employees of two businesses and one arts organisation, one consultancy, and 14 individual participants (affiliated with three separate arts organisations), totalling 48 people¹⁴ who engaged in a formal interview situation. The arts and business interviews featured mainly senior executives, either the CEO/MD, or the heads of community relations departments¹⁵.

The result was an eclectic and complex, yet mutually inter-related mix of individuals and organisations that took an active part in constructing the phenomenon under study. It provided a deep insight into who the different groups perceive as beneficiaries, how these benefits occur, the roles of the different constituencies and the necessary conditions.

5.5.2.1 Analysis

The data analysis commenced by separating the interviews into the specified subgroups. It proved complex as some managers fitted the employees' subgroup, and both

¹⁴ Two individuals figure in management and employee categories to reflect the dual function they perform; likewise one individual figures in employee and participant categories

¹⁵ See tables 1 a, b, c, d: 'Coding System' for a breakdown of the participants

employees and managers typically declared themselves participants in the respective arts organisations. On two occasions, the individual is included in both the manager and employee subset, as they embodied boundary spanners. Scholars argue that separating individuals into predefined subgroups maybe myopic, as individuals often belong to numerous subcultures concurrently (Wolfe and Putler 2002).

The interviews were transcribed in full to ensure high quality transcriptions, which were necessary to capture the particularities of each interview and to avoid losing any specific contextual insights (Braun and Clarke 2006). The analytical process utilised in the case study analysis was mirrored with the evident distinction of working with predefined themes. Following data reduction, the themes (Miles and Huberman 1994; Braun and Clarke 2006) were related to the documents and artefacts collected to corroborate the account, where appropriate. These were then compared with the propositions, and in consultation with literature, developed to reflect the arisen clarifications. For example, the interviews helped to clarify some of the micro processes involved in value trickle and slippage across the different levels and locations of analysis. The aim was to refine the propositions and add further conceptual depth to derive theoretical propositions based on thick descriptions on the reality derived through polyphonic voices (Geertz 1988; see also Frey and Fontana 1991).

Categorising the interviews into subgroups based on “role-based” categories enabled specific detail to emerge. It unravelled the complexities of some of the micro processes through which collaborative value is generated, from the respective group’s perspective. The holistic picture points to convergences, rather than widely divergent opinions across the categories. I found that participants could be grouped according to their normative beliefs in terms of either the value of the arts in society or the extent of the responsibility of business to society. Belonging to a specific subgroup in relation to the arts views was not strictly commensurate with the business responsibility, and vice versa.

Following the crystallisation, I incorporated some insights from people directly involved with IMS into the case study to provide a more holistic narrative. The grand design enabled me to construct a conceptualisation of modes of societal value creation and their respective operands, including the underpinning principles and drivers. I was then able to theorise the capacity of the respective modes to generate value for society and the

necessary conditions. This included the beneficiary co-creation role and relationships portfolios, as outlined in the final chapter of the thesis.

However, regardless of the amount of triangulation or crystallisation in trying to get to the 'truth', Fielding and Fielding's (1986: 68) caveat that "In the extreme, it is said that we can... never know anything sociological about people's beliefs and practices". Researchers can only attempt to construct a notion of reality from the "diverse accounts of reality... people provide" (Fielding and Fielding 1986: 68) and in so doing acknowledge "the politics and ethics" related to research (Denzin and Lincoln 2000a: 19). This forms the subject of the following sections.

5.5 Research Quality

Research methodology needs to both answer the research problem and satisfy the respective research quality criteria (Saunders et al. 2012). The quality benchmarks criteria in qualitative research are a subject of major debates dividing the field (Bryman et al. 2008). Kvale (1996: 229-252) posits that in assessing research legitimacy, the positivist concepts of validity, reliability and generalisability are legitimate. They merely need to be reconceptualised or tailored to suit the needs of qualitative research. Lincoln and Guba (2000) dismiss the positivist criteria and argue for concepts of authenticity and trustworthiness to better reflect the legitimacy of qualitative research. Wolcott (2009) remains somewhat sceptical about the usefulness of research validity or any equivalent concept in qualitative research. Qualitative researchers should instead focus on "careful explication of precisely how [they] went about [their] research" (ibid 2009: 80). As long as the research problem is clearly articulated and the research process explicated, the efficacy of research is reasonably satisfied. Silverman (2005) contends that the lack of criteria means that funding bodies and other professional bodies remain unconvinced about the merits of qualitative research. Therefore, it is beneficial to provide some form of quality guidelines that informed the study.

Wolcott's call for explicitness and transparency in research process, shown in the comprehensive account of methodological approaches undertaken is broadly adopted. To

explicate how this was achieved, the recent criteria proposed by Yardley (2000: 219-224) were followed (see table 8).

Table 8: Research Quality Criteria

Adapted from Yardley (2000).

Quality Criterion	Explication in Study
Sensitivity to Context	This is portrayed in the variety of existing theories and empirical findings discussed and compared with the empirical data collected. Also, the philosophical stance shows that I am aware of the different worldviews existent within the social world and how these impact various social phenomena. The section dealing with ethical issues shows how I dealt with potential harm and impact of the study on the participants.
Commitment and Rigour	I carried out extensive desk research to sensitise into the topic and to become fully aware of the multifaceted nature of the field of CVC. The methodology section shows my capabilities regarding methodological competence and familiarity with the diversity of data collection methods, as well as an appropriate method of data collection and techniques for analysis.
Transparency and Coherence	The chapter describing the research design addresses this. It is further made explicit in the findings chapter where excerpts of the textual data are presented to help others form their own analyses. Throughout the study the justification and reflections related to the decision made in the research design are offered. The authenticity of the case study was affirmed by the key protagonists of the research entity.
Impact and Importance	This study has a two-fold impact. It aims to contribute to the development of extant knowledge of societal value creation through arts and business collaboration. Its practical use could be seen in the fact that on a number of occasions, both during the case study phase and the subsequent interviews, the respondent reflected that although certain practices form part of their daily lives, they “never thought” about their wider purpose. Moreover, the MD of IMS frequently mentioned that our conversations make him more aware of certain issues that may otherwise be neglected. I have also independently observed that new relationships between arts organisations and businesses have formed following my involvement. In the current climate, the arts are on the receiving end of the financial cuts of the UK government. The reasons are often attributed to the lack of understanding of the impact on societal development. The conceptual framework carries a potential to contribute to policy development in relation to arts funding. The finding that the most effective and sustainable mode of value is created when all sectors collaborate, not merely encouraging increased arts and business collaboration that lacks the supporting structures in society, goes some way to informing the most effective future praxis of cross-sector collaboration.

5.6 Ethical Standards

May (2001: 67) contends that research ethics is an institutional construct. In addition to preserving public confidence and ensuring that people and their collectives are safeguarded from harm and the misuse of findings, it was developed “to ensure its status as a legitimate and worthwhile undertaking”. Research ethics in qualitative research are much debated (Bulmer 2001). The highly interactive style of data collection and the need to closely embrace the phenomenon has the potential to discover highly sensitive and personal information, leading to dilemmatic ethical situations (Sarantakos 2005). Particularly problematic can be field observations where gaining consent is impracticable due to large numbers of people, or disclosing the researcher’s identity is undesirable (Herrera 1999). In case studies, third parties may be implicated when consent has not been gained (Mason 2002a). Researchers need to ensure that the process fully adheres to a relevant code of conduct. As commented by Stake (2000: 447) participants must not be exposed to harmful consequences at any time as “the value of the best research is not likely to outweigh injury to a person exposed.”

The research presented here was summarised in an ethics form submitted to Cardiff Business School. The committee requested a clarification of negotiating access and anonymity within the case. This was duly clarified and the research subsequently approved by the research ethics committee¹⁶. A consent form was read and signed by all interview participants and anonymity was also offered¹⁷. The issue of anonymising the case study and the key protagonists was discussed with the management team at IMS. They felt no need to anonymise the scheme so long as the raw data was treated with strict confidence. This was adhered to fully. The non-problematic attitude to disclosing identity by using the real names was confirmed by all individuals interviewed for the purposes of developing the case study by indicating ‘NO’ on the consent form. Any third parties of whom consent proved impracticable are preserved anonymity. During my presence in the office in the document analysis phase, all people were aware of my identity. During observations, I disclosed my identity to anyone I came into direct contact with. At the showcases, it was not possible to inform everyone about my presence. IMS gave me permission to take a private record of the

¹⁶ See appendix 9 for the research ethics form.

¹⁷ See appendix 10 for a generic consent form.

event for research purposes. The events were accessible to the wider public and so were considered outside the 'private' domain.

5.7 Summary

This chapter set out the grand research design. It outlined the implications of the philosophical assumptions and topics under study on the methodological choices, and described the research strategy and its implementation. The ethical considerations and issues of quality of the research design were also considered. In response to Selsky and Parker (2005) who say that cross-sector collaboration research lacks longitudinal contributions, the basis of the fieldwork was a longitudinal case study, the conceptualisation of which was triangulated with a study that utilised cross-sectional interviews to achieve 'completeness' (Knafl and Breitmayer 1991). The findings and conceptual framing that emerged from the grand research design will be outlined in the ensuing chapters.

CHAPTER 6: CASE STUDY

6.1 Introduction

Chapter 6 opens the part of the thesis that reports the results of the fieldwork. The findings form the basis of the conceptual framework outlined in the final part of the thesis.

This chapter narrates a case study of the evolution of It's My Shout (IMS), a community arts organisation. It invites the reader to enter the story of the endeavours and struggles to serve society by nurturing the arts and creativity by pursuing a collaboration strategy with business as defined in chapter 3. The chronological order traces the sequence of actions, the maze of relationships and dynamic evolution by mapping the key events and identifying individual roles related to value creation and its effects on society. The case study offers first and second order interpretations (Angell and Demetis 2010) of societal value generating activities through arts and business collaboration (Austin and Seitanidi 2014).

6.2 It's My Shout: A story

“Established in 2003, It's My Shout was originally set up in Bridgend (South Wales) to provide practical experiences in film, television and media for young people in Wales who would not normally be able to access such opportunities, providing hands-on training, alongside film professionals. It's My Shout has now developed into a National Short Film scheme and is supported by the industry. ... To date, thousands of people have participated in the scheme from across South and West Wales and have developed the skills which have enabled them to enter the film and TV workforce, in their preferred craft area. Many have found ongoing employment in the industry as a direct result of the scheme.” (IMS 2012)¹⁸

¹⁸ For a detailed account of the structure and scope of IMS, please see appendix 11.

6.2.1 Prelude

The ensuing chronological review traces the evolution of IMS through major changes and developments in the organisational structure, people's actions, events and processes that impacted on organisational outcomes since the inception in 2002 up to January 2011 that contributed to sustainable societal value creation. The narrative comprises two phases, each consisting of distinct stages: an Emerging phase – Forming stage (2003–2004), followed by a Learning stage (2004–2006); and a Professionalising phase to include a Transferring stage (2006–2007), an Enterprising stage (2007–2010) and a Transforming stage (2010–January 2011, and beyond).

6.2.2 Emerging phase: Forming stage before 2003–2004

IMS was established in September 2003 in Bridgend, South Wales, as the “brainchild” of Roger Burnell. In the early 2000s, four wards within Bridgend County Borough ranked amongst the top 100 most deprived areas in Wales, as evidenced by The Welsh Index of Multiple Deprivation. Roger Burnell, having left his post of 31 years as a drama teacher in the county, took on a role at the Bridgend County Borough Council (BCBC) as a consultant in an advisory capacity and a Director for Theatre. He set-up and co-ordinated projects to access socially-excluded young people in the county and to provide them with an opportunity to express themselves through acting and other arts related activities formed a significant aspect of the remit. Roger was also at the time the District Director of Bridgend Youth Theatre and as a former drama teacher, he was arguably ideally positioned to engage in this area. Described by his former students as having the ability to positively influence young people, British actors Rob Brydon¹⁹ and Jan Anderson²⁰ speak of

¹⁹ Rob Brydon is a critically acclaimed Welsh actor, comedian, radio and television presenter, singer and impressionist. He has won and been nominated for a number of awards, including The British Comedy Awards (won), and BAFTA (nominated). He is best known for his role of Bryn in the award-winning British comedy Gavin and Stacey and has his own chat show on BBC, The Rob Brydon Show. He also starred in an Oscar nominated short film, Animation; amongst many others TV series and movies.

²⁰ Jan Anderson is a Welsh actress. She has had roles in many British TV series and films to include Holby City, Casualty, The Bill, Torchwood. She also starred in Miramax's produced Human Traffic and acted in a number of Hollywood productions.

the former teacher: "He instils a calm, unshowy, unfussy confidence" and "Roger definitely takes the worst of you and nurtures it and turns it into the best of you", respectively.

Roger was inspired by his work to formalise the projects and establish a training scheme within the arts context that would provide disadvantaged young people with a gateway into the creative industries, by: "reinforcing the idea that performing arts shouldn't be elitist or particular to kids with certain talents, but open to all in all aspects of the arts".

In December 2002, a considerable funding grant was provided by the Arts Council of Wales to assist with arts-based projects aimed at youth inclusivity in the Bridgend area, giving Roger an opportunity to extend the scope of the activities and reach of Bridgend Youth Theatre. IMS initially functioned as a pilot arts-based project for addressing youth social deprivation within the BCBC and formed part of the Bridgend Youth Theatre, as interpolated by Roger:

"... I originally set up IMS with ten young people who'd been excluded from school, and in some instances from their families when I was a Director of Theatre at Bridgend County and as part of that... we did a book of poetry and they wrote some music and it involved dance and theatre..."

The inclusivity efforts in the area included a grant by the Prince's Trust to fund a project that saw the Welsh National Opera run a series of workshops to help devise an operatic piece with the Bridgend Youth Theatre. On 28 February 2003, Prince Charles attended the opera performed by the young people at Pyle Life Centre in Bridgend. The IMS group partook in the performance and IMS was thus brought to the attention of the Prince. Impressed by the performance and appreciative of the work put into the development of IMS, Prince Charles invited Roger Burnell to attend the annual garden party at Buckingham Palace.

Following the royal seal of approval, a one-off project was brokered with BBC Wales, where the IMS participants produced a film entitled "Down". The project honed in the perceived fit between the target group and film and media as a desirable art form for young people. The film focused on the issues of social exclusion, and was produced under the supervision of film professionals at BBC Wales. The film addressed the inherent issues of inclusivity as experienced by the scheme's participants. Highly popular with the young

people who participated, the project's success was affirmed by the screening of the film on BBC Wales in 2003.

6.2.2.1 Kylie Cornelius-Rees Arrives

Growing interest in the scheme's mission resultant of the publicity of the royal visit and the recognition by the BBC provided an opportunity for growth both in terms of reach and capacity building. In mid-2003, Kylie Cornelius-Rees, a former member of Bridgend Youth Theatre, joined as Roger's assistant. Kylie had recently left school and wanted to pursue a career in the media so was attracted by the opportunities to assist with the vocational side of the scheme's scope:

"... I was intending to do media anyway so it was a good opportunity to start learning about the industry and projects in the arts before I went..."

With the operational and administrative tasks delegated to Kylie and the finance department at BCBC, Roger focused on the scheme's development by looking for potential collaborators, as well as further clarifying the artistic focus. As IMS continued to evolve throughout 2003 and 2004, it purposefully transformed from ad-hoc projects organised as part of Roger's advisory role within the council in Bridgend, into a formal scheme with a growing reputation of a socially driven entity with a creative remit in South Wales.

Local media attention significantly increased the awareness and enhanced the profile and reputation of IMS within its locality *"people began to notice what we were doing"* (Roger). Decision makers and other influential people active on the Welsh political and business scene were steadily becoming familiar with the work of IMS. Following the media exposure, the Director of All Wales Media Technology Programmes at the then Welsh Development Agency (WDA), Patrick Sullivan, contacted Roger and expressed an interest in the scheme's mission as it was compatible with the regeneration of the deprived Welsh Valleys objectives of WDA in the early 2000s. Patrick Sullivan began to champion the scheme and although no formal alliance formed, WDA provided a one-off grant to the scheme to assist in instigating activity in the South Wales Valleys.

6.2.2.2 The emergent 'creative partnerships approach' strategy

Patrick Sullivan was instrumental in facilitating meetings with key players in the creative industries in Wales. In late 2003, relationships were forged with Barcud Derwen Group, an independent group of television and audio-visual facilities and CYFLE, the training company for the creative industries in Wales. Barcud Derwen Group became the first business supporters of the scheme. In return for marketing related benefits linked to the short films production, Barcud Derwen Group agreed to provide ongoing in-kind sponsorship in the form of reduced rates for post-production stages.

The collaboration with CYFLE entailed CYFLE trainees being sponsored to participate in different roles in the short films IMS produced annually. These initial alliances bolstered the credibility of IMS and it was no longer just another socially driven project that sought to engage disenfranchised youths. It provided a halo of credibility of a developing professional scheme with quality outputs "with essential value in themselves". A shift in the mission of IMS from being solely socially driven, to incorporating a vision to develop new talent in the creative industries in Wales was affirmed through the industry collaborations. However, new talent development entailed a particular focus on areas of social deprivation as stated by Roger:

"... To increase the demographic share for, you know, inclusivity in terms of working class involvement in the creative industries..."

Different bodies and agencies that cater for young people who might be at risk or who might be looking for an opportunity to extend their soft and vocational skills formed the sources for recruiting potential talent.

By the end of the first year, the scheme's scale expanded in terms of the number of participants, but also the scope altered to offer opportunities to youths from different social backgrounds. In order to align with the educational responsibilities of the target audience, as well as to comply with Roger's wider responsibilities at the BCBC, a decision was made to operate IMS as a summer scheme. Under Roger's command, IMS formed into a socially and vocationally oriented venture, with a strategy based on a strong collaborative approach.

6.2.3 Emerging phase: Learning stage 2004–2006

6.2.3.1 *The ITV Wales collaboration*²¹

Collaborating with Barcud Derwen and CYFLE shifted the creative context of the direction of IMS towards film and media production. Roger began to recognise that as the head of artistic content, film production was outside his immediate area of expertise:

“...because my background had been theatre and in particular education, I felt that although I’d been connected with film, that there was a certain lack of knowledge on my part in terms of how broadcasting worked.”

Aware of these shortcomings, Roger contacted the Managing Director at ITV Wales, Roger Lewis, in early 2004 with a collaboration proposal. Engaging with communities and young people in Wales proved appealing both on a personal level to ITV’s MD, and it was closely aligned with ITV’s objectives to encourage and help facilitate opportunities for young people in acquiring the necessary skills to pursue a career in broadcasting. Roger Lewis’s interest in the mission and the close industry alignment provided ideal foundations for a strategic alliance based on an intensive working relationship. The collaboration saw the mobilisation and mutual exchange of core competencies, to include more generic assets. ITV Wales suggested that the collaboration included the mentoring of Roger and the trainees in broadcasting related skills. In addition to the vocational support of professional mentors in different stages of film production and broadcasting, IMS was also provided with significant financial and in-kind sponsorship and a base at ITV Wales. Roger received ongoing personal training by the Director of Programmes, Elis Owen, and the head of drama, Peter Edwards. Both individuals shared Roger’s *“... passion with regard to developing new talent, particularly in areas of social deprivation...”* ITV Wales became the principal business partner, having fully integrated the scheme into its local operations.

In return, IMS engaged the network of partners and trainees to work on producing a series of short films for screening on ITV Wales. In the first year, mentored by ITV Wales experts, IMS trainees produced three short films, with the scripts written by amateur young

²¹ ITV Wales (also known as ITV Cymru Wales) is licensed by ITV plc. and is an integrated producer broadcaster. It is the largest commercial television network in the UK. (itvplc.com)

people in South Wales, selected through the talent seeking programmes run by IMS. This was to be followed by further short films produced every summer in the subsequent years of the collaboration. Fully accredited as produced by IMS trainees, the films would be screened on ITV Wales every year. Many films addressed sensitive social issues, such as racial discrimination, different forms of marginalisation, bullying or domestic violence, as perceived by the respective community members reflected in the scripts.

Whilst based at ITV Wales, Kylie's role changed to accommodate her university studies. In September 2004, Kylie began a media studies course and so her contract with BCBC altered to an intermittent Project Manager, put on payroll by BCBC each summer. In this role, Kylie developed her practical vocational skills during film productions, to progress from production assistant and assistant producer, to becoming a co-producer for IMS at ITV Wales.

Throughout 2004 and 2005, secured by the BCBC mandate and a growing portfolio of industry collaborators, IMS progressively developed into a scheme that nurtured creative talent in South Wales by providing a gateway into the film and media industry. It primarily catered to young people between the ages of eight to 25 with an interest in developing vocational and soft skills in the backdrop of the creative industries, with the view of raising awareness of the potential within the creative industries in general. Although it was continually administered by the Arts Office of the BCBC, IMS was based at the ITV Wales Television Centre in Cardiff. It was positioned as a part-time summer scheme to provide opportunities to a) access the film and media industry for young people between the ages of eight to 25 who would otherwise not perceive the creative industries as accessible to them; and b) gain practical experience for people with an interest in film and media. IMS was beginning to benefit from an emerging unique image of a professional venture both in terms of approach and creative output.

In late 2005, the essential and instrumental value associated with the scheme's work culminated in one of the three films produced that year, *The Playhouse*, being nominated for the best short film at Cardiff Film Festival.

In March 2006, the Royal Welsh College of Music and Drama (RWCMD) confirmed its interest in becoming a partner. The letter confirming the support stipulated that a two-year financial sponsorship was conditioned upon their involvement in the production of one of the short films each year. IMS provided the students of RWCMD with opportunities to

improve vocational skills by actively participating in their respective field of film production, whilst being mentored by industry professionals. The students' continued vocational development was supervised by their RWCMD tutors, a number of whom subsequently became honorary mentors at IMS.

Also attracted by the practical filmmaking skills opportunities for trainees, the Skillset Media Academy Wales (SMAW)²² became a significant financial supporter in 2006. The alliance centred on practical training and work experience for SMAW students across different film production departments.

Commitments from the newly established relationships with the higher education colleges required more systematic processes to ensure the students' progression. Combined with Roger's ambitions for further strategic growth, the need for a more formal management approach with a clear demarcation of responsibilities became apparent. In 2006, the vocational, and to a large extent artistic aspects, were predominantly delegated to the collaborating industry professionals and supporters, with Roger retaining overall authority. Beyond acting as Executive Producer, Roger continued to develop the scheme's strategy that included establishing further alliances with intra and inter-industry partners, to strengthen the scheme's sustainability. Kylie continued to deal with operational and administrative aspects of the scheme, and also production opportunities. IMS mandate remained with the BCBC, which administered the scheme's accounts.

6.2.3.2 The "creative partnerships approach"

The high quality of the films produced and aired in 2005 resulted in the intensification of the ITV Wales collaboration. Each partner committed further resources, both in terms of generic resources and core competencies, to include skills and expertise, and the scope of activities broadened. The developments saw Rebecca Davies employed by ITV Wales to act as a full-time producer and strategic development assistant for IMS in April 2006. With an additional member of staff, and further assistance from IMS partners, six short films, plus a documentary that featured behind the scenes footage of the making of

²² SkillSet Screen Academy Wales is a centre for media education and training consisting of a consortium of higher education institutions, to include the University of South Wales, Swansea Metropolitan University and Aberystwyth University (<http://www.screenacademywales.org/>)

the films, were produced in the summer of 2006 and screened on ITV Wales in November and December 2006. The films brought together newly appointed and existing trainees from the local communities with students from the partner colleges to bring to life scripts written by people in the Welsh communities. They were filmed in non-traditional locations, described by one of the ITV Wales mentors, Producer and Director Lisa Edwards, as: “places that need a bit of sunshine”, where most trainees are from the respective area, the scripts “reflect life in some way”.

In the learning stages, the expanding scope, scale and reach of IMS resulted in growing demands on resources both financial and human, with the running costs steadily outgrowing the budget available at the BCBC. By the end of 2006, with the help of a growing portfolio of partners, over 2,000 young people had been engaged. 1,500 people aged between six and 60 from a diverse set of social backgrounds participated in 2006 alone. The exponential growth was the first sign of the imminent structural changes.

6.2.4 Professionalising phase: Transferring stage 2006–2007

6.2.4.1 *The emergent ‘national training scheme’*

A meeting with The Head of Sport, Leisure and Arts at the BCBC in late 2006 advanced a notion that the scheme would benefit from an independent status from the council. The director suggested that developing IMS outside of the BCBC would be advantageous if the growth and development beyond the Bridgend County was to be sustained. It would also secure the continued involvement of the BCBC, securing the close working relationship. Roger shared in the proposed change in what he summarised as the need for “flexibility to allow it to grow and allow us to make more industry contacts”. On 16 November 2006, a local newspaper reported that IMS was set to be extended into a national training programme to provide training opportunities and work placements for young people across the whole of Wales. Roger was expectant following the “phenomenal response” to the scheme from the trainees, the industry in general and the partners, yet he recognised that outside the unconstrained growth opportunities, the proposed mandate change entailed a degree of risk to the scheme’s stability. The security of the ringfence provided by the public sector mandate was disbanding.

The collaboration with ITV Wales formed the decisive backdrop to the changes. The fit between the organisations ensured that the collaboration matured into a closely involved and highly productive working relationship, with both parties firmly committed to future collaboration. The scope of the collaboration settled into co-producing and screening six short films, plus a documentary on an annual basis. This commitment strengthened in early 2007 thanks to a nomination of the short film, “The Hunt for a Next Bob Crutch”, produced by the trainees in 2006, for a best short drama at the Celtic Media Festival. Underpinned by excellent personal relations and recognition for quality output, the alliance reinforced Roger’s decision to establish the scheme as an independent enterprise that reached young people beyond South Wales.

6.2.4.2 Broadening the partnerships approach

In 2007, ITV Wales facilitated the support of Arts and Business Cymru (A&B)²³ to assist the plan of enhancing and extending IMS to create a pan-Wales initiative. The A&B support centred specifically on objectives to target young people. IMS would access individuals outside mainstream education and generate activity in underserved communities, where trainees would benefit from gaining business and creative skills required in the film industry. In addition to the financial investment, A&B brokered meetings with Barclays Bank and Hugh James solicitors in Cardiff to assist with the objectives. Roger met with representatives of the potential partners in early 2007 and explained the mission and the aims of IMS. Barclays supported the scheme as the work was congruent with the company’s community support programme. Kathy Brown, the Community Investment Manager, described the focus and said: *“Young people in particular don’t know how to manage money, so we want to get them at a very early age... We quite often get our staff to go help an organisation.”*

Hugh James identified a link between the organisations’ values based on developing young talent. Both companies became corporate partners and provided financial and in-kind

²³ Arts and Business Cymru (Wales) is a social enterprise that focuses on facilitating arts and business collaboration. The mission on the website states: “A&B Cymru’s role is to promote, enable and develop mutually beneficial partnerships between business and the arts” (<http://www.aandbcymru.org.uk/about/>).

support for the scheme in 2007, with the view of further collaboration, pending end of the year evaluation. The portfolio of business partners was further enhanced by two creative industry companies. Ethos Creative designed a comprehensive website for IMS and Boomerang Media, a television production company provided significant in-kind support.

In the meantime, Kylie Cornelius-Rees graduated from her media degree and returned to the scheme full-time as an employee of BCBC. With Rebecca and Kylie covering the majority of the operational duties and responsibilities related to the daily management of the new partners, Roger was able to continue extending the portfolio of contacts. Alliances with a fit aligned either through the social mission or industry affiliation became the key strategic tool in the new era, described by Roger as *“a strong partnership approach”*.

Key industry, public sector and corporate alliances were forged during 2007. Carmarthen, Caerphilly, Neath Port Talbot and Blaenau Gwent Councils joined as part of the geographical expansion of the scheme’s reach. Partnering with the additional local authorities further bolstered the financial stability in times of the mandate transition and also considerably expanded the pool of potential trainees and participants. The Carmarthen Council collaboration facilitated links with Coleg Sir Gar in Llanelli. Running workshops with the students helped identify new talent. Working with the different councils also enabled access to a broader range of agencies that worked with young people. IMS accessed different marginalised communities and social groups and earned further professional kudos.

The collaboration with Caerphilly County Borough Council saw IMS work with a group of autistic young people, helping them develop soft skills through creativity. Integrating creative outlets for individuals and groups with learning difficulties into the remit extended the mission to create opportunities for people from all walks of life in Wales and to reach other marginalised groups.

6.2.4.3 The Sony collaboration

The proven track record with local community engagement, particularly in engaging disaffected youths figured as the key enabler of the relationship with Sony UK Technology

Centre. The initial contact with the Managing Director, Steve Dalton, was facilitated through a personal relationship of one of the scheme's personal supporters. A personal friend of both Steve Dalton and Roger, the supporter recognised the potential fit between Sony's CSR objectives driven by the MD's personal interests in developing the local community and the mission pursued by IMS, and brokered the introductory meeting. The leaders were receptive of the suggested alliance, having quickly recognised that their visions complement each other, in what Roger described as *"similar interests in terms of community, young people, sport"*. The meeting resulted in collaboration with the aim of engaging young people in the Bridgend area.

At the outset, the engagement between the organisations was minimal. Sony provided in-kind support for the scheme and IMS promoted the relationship in the communication material, and credited Sony as a supporter in the short films based around Bridgend.

6.2.4.4 Trainee Benefits

In 2007, the trainee base expanded to 400 people and was made up of new entrants and seasoned trainees. Creative Industries Research and Innovation Centre (CIRIC) at Swansea Metropolitan University supported the film production in the 2007 series by providing access to top Special FX facilities and financial contribution towards technical staff. The trainees also benefited from ongoing vocational mentoring by the industry professionals at ITV Wales and RWCMD. The mentor base further consisted of leading television and film personalities such as Michael Sheen OBE²⁴, Rob Brydon and Ruth Jones²⁵, as well as many renowned directors, including Terry Dyddgen-Jones of Coronation Street²⁶ and an Oscar nominated director Paul Turner.

²⁴ Michael Sheen is a critically acclaimed Welsh stage and screen actor who made his debut in 1991 at the Globe Theatre in London. He is known for playing David Frost and Tony Blair in TV series and films. He has starred in Doctor Who, The Twilight Saga, Midnight in Paris directed by Woody Allen, and many other films. He has won a number of professional accolades including the Kansas City Film Critics Circle Award for Best Supporting Actor, British Independent Film Award – Entertainment Personality Award, Los Angeles Film Critics Association Award for Best Supporting Actor, Toronto Film Critics Association Award for Best Supporting Actor. He has also been nominated for Emmy, BAFTA and Laurence Olivier awards for different roles.

²⁵ Ruth Jones is a Welsh TV actor and writer, best known for co-writing and playing Nessa in the award-winning TV series Gavin and Stacey. She has appeared in British TV series EastEnders, Little Britain, and Stella.

²⁶ Coronation Street is a long-running (over 50 years) and highly popular British soap opera on ITV.

The opportunity to engage with highly successful industry professionals on a daily basis presented a chance for IMS trainees and partners' students alike to expand their social networks and build vital industry contacts. As recalled by one of the trainees, Gareth Rhodri Hughes, whose script was selected for the 2007 series: *"Not only did it put my work on the screen for the very first time but also put me in touch with numerous people in the industry which has since helped further my career."* Following his participation in IMS in 2007, Gareth secured a job as a Story Editor at Boomerang Media, one of the scheme's business partners.

The mentor base underwent a transformation in 2007 and expanded in an innovative manner. With professional progression provision for the trainees becoming a crucial "missing link" in the strategy aimed at developing creative talent, trainees from previous years with a proven track record of having developed the necessary skills and knowledge, both within and outside of IMS, were offered mentoring positions as heads of their respective departments. Amy Morgan²⁷ started her acting career at IMS during the first films as a supporting actress. In subsequent years, Amy continued to participate as an actress and a trainee production co-ordinator. As she developed, both personally and vocationally, Roger suggested that she stepped up to become a mentor for the novice actors, sharing the skills and knowledge she had acquired through her time at IMS.

The need to ensure vocational progression for the scheme's trainees became the backdrop of the evolving nature of the RWCMD collaboration that occurred in 2007. Following the initial largely transactional, financial sponsorship, the close fit between the missions to nurture the best talent in Wales provided the basis for a reciprocal core competencies exchange. Roger explained the development: *"The relationship is no longer financial but we do meet on a regular basis, to target individual trainees who might be good for them to look at and to take through, who might have slipped through their net for different reasons."*

The actor Aneurin Bernard²⁸ also developed his acting skills and knowledge of film production at IMS prior to securing a placement at RWCMD. Continuing to gain practical on-set experience at IMS throughout their studies, he and Amy Morgan successfully graduated

²⁷ Since writing this case study, Amy Morgan has appeared in critically acclaimed BBC series *Holby City*, *Baker Boys*, and *Father Brown*.

²⁸ Since writing this case study, Aneurin Barnard has appeared in a number of movies and TV series, including *Hunky Dory*, *Mary*, *Queen of Scots*, *Elfie Hopkins* directed by Ryan Andrews and the latest BBC co-production drama series *The White Queen*. He was also awarded "Outstanding Achievement" award at the 10th anniversary IMS awards in 2012.

in 2008 to become critically acclaimed personalities in their professions. Aneurin Barnard's experiences cumulated to win him the Laurence Olivier Award for best actor in 2010, exemplifying the significant individual benefits potential, as well as the wider societal enrichment.

Ben McGregor²⁹ benefited personally as one of the trainees whose talent was nurtured through this collaboration. After being selected for the lead role in the short film "A night on the tiles" in an open audition in 2005, Ben won the "Best Senior Actor" at IMS awards that year. Roger spotted Ben's natural aptitude for acting and recommended him to RWCMD for having both the required innate talent and a keen interest to develop as an actor. In 2007, Ben was provided with support at IMS to help him pursue a formal acting career, as Ben declared: *"Through It's My Shout I worked closely with a member of RWCMD to ensure I had the best possible chance to enter the college"*. Ben McGregor secured his place at the RWCMD in 2008.

The young actors endorsed the elemental role that IMS played in their development, describing the scheme as an "invaluable experience" that provides the crucial "step up" and the "edge and a head start" in a highly competitive industry. Amy commented: *"I will always be incredibly grateful"*, with Aneurin stating that *"it really is the best possible start"*. Ben further added that IMS *"inspired me to believe that I could better myself and have a real chance to succeed"*.

Amy further found engaging in the process of creating a film *"incredibly fun"*. This sentiment was shared among many other trainees and ad hoc extras who took part in the filming in their communities. A local magazine, City Life, reported on the filming of one of the short films at a local college as *"everyone had a really great time with much humour and friendliness all around"* (City Life 2008). Bringing entertainment and enjoyment into deprived communities and enabling the local people to have fun whilst partaking in the filming was becoming a central aspect of the remit of IMS. Roger saw it as an alternative, more practical approach to the developmental agenda of the Welsh Government:

²⁹Since writing this case study, Ben McGregor has graduated from RWCMD in 2011. Before his last semester was completed, he was offered a role in the Channel 4 series "Fresh Meat". He has since appeared in the BBC series "Baker Boys", "The Indian Doctor", Holby City; and is rumoured to appear in a forthcoming movie "The Machine".

“... there’s a danger that those communities become isolated through inactivity. And isolated from everybody else, what’s going on... So suddenly everything passes above them and they just ended up, sort of just observing life. And that’s how things stagnate...”

Improving local communities was also in keeping with the business partners’ interests and so was of strategic importance to the scheme’s stability.

The Barclays and Hugh James collaborations entailed financial and in-kind sponsorship, part of which incorporated reciprocal transfer of skills through employees’ engagement. The trainees in the 2007 summer series benefited from attending workshops led by experts from both businesses aimed at developing financial and business knowledge. The experts gave invaluable advice on practical business set-up, crucial for pursuing a freelance career typical for the creative industries. Three IMS trainees set up their own businesses as a direct result of the workshops in 2007 alone. The business employees in turn joined the film productions, acquiring different creative skills related to film production.

The 2007 annual showcase took place at the end of October at the Grand Pavilion in Porthcawl. The short films were screened in front of the trainees, their families and invited VIP guests made up of industry professionals and the scheme’s partners. Steve Dalton and other senior executives of Sony were amongst the VIP guests. Already familiar with the work Roger was doing at the Bridgend Youth Theatre, and exposed directly to the positive impacts of the scheme in the local community, Steve Dalton became an avid personal supporter of IMS. Roger met with Steve Dalton after the showcase to discuss how Sony could become more involved, whereupon the collaboration extended. Driven by Steve Dalton’s personal enthusiasm, the collaboration began to transform into a key strategic alliance, underpinned by a developing personal relationship between the leaders.

6.2.4.5 Stirring the broadcasting giant

Concurrently, the then Director of BBC Wales, Menna Richards, contacted Roger with an invitation to join BBC Wales in a consultancy role. Roger’s personal commitment

and proven track record to drive creative talent amongst young people were stated as highly desirable to drive the BBC outreach projects. As a public body in the UK mandated by the government, BBC Wales was pursuing a project called BBC Blast which was dedicated to providing opportunities for underserved young people to develop creative ideas and talent. Roger was appointed as a talent consultant for BBC Wales in late 2007, with a remit closely aligned with the mission of IMS: to maintain contact with new creative talent emerging in Wales. The appointment provided crucial opportunities to extend the support network of IMS towards the key media industry players in the UK. Roger's affiliation with BBC Wales raised the scheme's profile and further substantiated the role of IMS as one of the key purveyors of creative development in Wales.

Roger was encouraged by the new appointment at the BBC and the emergent successes of IMS in terms of creative output, funding streams and positive response from trainees, mentors, supporters and partners. Because of this, he took an early retirement from BCBC in the latter part of 2007 in order to develop IMS formally as a national training scheme. A consultancy meeting with experts from Barclays and Hugh James was arranged to progress the dissolution of the BCBC mandate. Based on the advice received, Roger set up IMS as a limited liability company, establishing the preliminary foundations for a new era of IMS as an independent national training scheme for the film and media industries in Wales.

6.2.5 Professionalising phase: Enterprising stage 2007 – 2010

IMS was incorporated as a limited liability company on 22 November 2007, with Roger heading the scheme as the Managing Director and Executive Producer. Kylie migrated with the scheme as a freelance Project Manager and Producer. Rebecca Davies remained on the back of the ITV Wales collaboration. By the end of 2007, the team successfully secured a range of alliances with education and industry contacts.

6.2.5.1 The dual mission – integrating the social into the professionalising efforts

The process of developing the scheme into a national training scheme under private ownership was beginning to infringe on the reputation of IMS as a socially oriented

enterprise. This was accentuated by the increasing responsibilities to the partner colleges to provide professional training projects for their students by engaging them in quality productions. In 2007, most of the IMS trainees were BA and MA students from the SkillSet Media Academy and the RWCMD. This was further augmented in early 2008 when IMS partnered with the Atrium at the University of Glamorgan³⁰. Managing the scheme became “*a bit of a balancing act*” (Roger) to ensure the continued development both in terms of providing opportunities for people looking to develop their existing vocational skills and nurturing creative talent at the basic community level. Roger was acutely aware of the pressure on quality vocational development demanded by partners “*weighted that way*”, but as he explained:

“... the social agenda stayed strong, certainly with me... I definitely have got a, with a small p, a political agenda and if that isn’t to the forefront, then you can manipulate the system so that it is perhaps a little fairer...”

The community engagement aspect was also the key motive of the new corporate partners. The relationships with Barclays, Hugh James and Sony were based on the community development agenda. In particular, the Sony collaboration was firmly rooted in providing creative opportunities for local youths in Bridgend.

Following the meetings in late 2007, the Sony collaboration was set to transform from a largely philanthropic relationship, to Sony confirming a two-year relationship development programme. The substantial financial sponsorship, along with in-kind support by way of expertise and equipment stipulated that apart from using the money as core funding for the operations of the scheme, part of it must fund projects based in the local area, in accordance with Sony’s CSR objectives. Roger isolated this demand as the sole contentious issue in the relationship ever experienced:

“...there was one discussion we have had, where Steve, it wasn’t a problem but Steve stressed the need for erm, Sony’s contribution to be seen as being more localised... it

³⁰ The Atrium is the Cardiff School of Creative & Cultural Industries. It opened in 2007 to bring together creative disciplines within the University of Glamorgan.

was important that it was marginalised young people, that it was Bridgend and the neighbouring areas... So that was something to take heed of..."

As the key corporate partner, Sony provided an invaluable industry stamp for the programme, enhancing the scheme and the trainee projects, and offering open access to the industry giant's network. IMS reciprocated through traditional marketing, press and PR benefits and also provided Sony with product placement opportunities and its trainees helped out at corporate and film events, company functions and training days.

A series of new contacts established by Roger following the structural changes in late 2007 helped to restore the crucial balance between the social and professionalising growth objectives. Links were forged with the Film Agency for Wales, as well as with the British Board of Film Classification who provided a one-off investment. The collaboration with the Film Agency for Wales was anchored within the Department for Culture, Media and Sport under four strategic priorities that underpinned the Public Service Agreement targets with the Treasury. The objectives stipulated were: enhancing the access to culture and sports to young people; community engagement; contributing to the economy; and modernising delivery (see table 9 for full wording). IMS delivered these by focusing on developing creativity and talent in marginalised groups and communities, particularly young people; and by providing progression prospects by facilitating the development of soft and vocational skills required for a career in the creative industries.

Table 9: MS ad Film Agency of Wales collaboration – strategic priorities.

Source: DCMS (2004)

DCMS Primary Aim:	To enhance people's lives by supporting and promoting a wide range of activities within areas which people care passionately about such as sport, art, music, theatre, historic buildings and good design, where they are going on holiday and what they watch on TV.
DCMS Four Strategic Priorities	Children and young people: enhancing access to a fuller cultural and sporting life for children and young people and giving them the opportunity to develop their talents to the full.
	Community: opening up our institutions to the wider community, in order to promote lifelong learning and social cohesion.
	Economy: maximising the contribution which the tourism, creative and leisure industries can make to the UK's economy.
	Delivery: modernising the way we deliver our services, by ensuring that our sponsored bodies meet targets which put customers first.

Having demonstrated more defined structure and focused processes in place, combined with the newly assumed outreach work, the Arts Council of Wales (ACW) re-joined as a partner with the view of funding the scheme's outreach projects. ACW provided two years of funding to assist in stimulating activity in marginalised communities in Wales. With the help of the partners, links were forged with the Bangladeshi Welfare Association in Cardiff and a series of workshops for practical and business opportunities in film and television. Acting and production skills workshops were also held at the community centre in Riverside in Cardiff throughout 2008. Following the workshops, IMS worked with the association to produce "Paan – The Green Leaf", a short film about a community tradition, which was subsequently screened to different audiences. The project was extended to the Sudanese Welfare Association in subsequent years. Providing access to the media industries and facilitating better integration of these communities by raising awareness of ethnic minority cultures to other people in the area was set as the primary aim against which IMS worked to deliver.³¹ As a result of the projects, one of the trainees established regular workshops for other members of the Bangladeshi community in Riverside.

6.2.5.2 Internal re-structuring: The era of Roger and Rebecca

At the end of January 2008, Kylie decided to leave IMS to broaden her knowledge of the industry: "... because I hadn't had the opportunity to do anything else. And I realised, even though I really enjoyed IMS, it's really stressful." The scheme's strategic aspects were managed by Roger, with Rebecca co-ordinating the daily operations. Production was managed by Roger with the help of Peter Edwards at ITV Wales.

6.2.5.3 Tangential instrumentality of the essential value

The magnitude of results of the highly integrated ITV Wales collaboration was substantiated on 27 April 2008 when the short film "Owl Creek Bridge", directed by John Giwa-Amu, was awarded a BAFTA Cymru award for Best Short Film.

³¹ Information taken from Arts Grants for Organisations, an Arts Council of Wales document previewed during documentary analysis (appendix 7).

The legacy and societal benefit of this collaboration were further confirmed in May 2008 at the A&B awards ceremony in Cardiff. IMS was announced as the winner of the “Legal & General Arts Award”³² for its creative collaborations with ITV Wales, Barclays and Hugh James Solicitors. In addition, ITV Wales won the “Arts, Business and Young People” award for the ongoing support of IMS. The awards brochure included a note describing IMS as an *“incredible project which is helping to ensure the future of the Welsh film industry”*.

The ITV Wales collaboration generated a range of benefits to include significant image and profile enhancements for the organisations, the intrinsic artistic value of the films produced, and the benefits for all the participants. Two trainee writer-directors from the 2005 and 2006 series, Tony Hurley and Tony Forster, secured further development opportunities from the Film Agency Wales that saw them developing a feature film each. Tony Forster has since established himself as a writer-director at the Digi Shorts scheme run by the UK Film Council.

Other participants commended the work IMS was doing with the help of ITV Wales for giving a voice to people from a diverse range of communities. Kyle Tovey, an IMS trainee from Ebbw Vale said:

“I think it’s awesome that a scheme like IMS can broaden the skills of pupils... especially in Blaenau Gwent where we have so many keen young people who don’t get the praise they deserve, but with IMS this becomes obvious through the screening on ITV Wales.”

Shortly after the awards announcement, Barclays confirmed a second round of financial and in-kind support, based on the positive evaluation results in terms of the quality of the short films, the positive response from trainees regarding the financial and business skills workshops, and the tangible outcomes in the form of new business start-ups. The sponsorship centred on maintaining links with local communities, particularly in terms of helping to extend social inclusion and financial and business education for young people in Wales.

³² The Legal & General Arts Award is a cash prize of £2,500 given to an arts organisation that has worked most creatively in partnership with business to maintain and develop its activities (A&B 2008).

In light of these significant achievements and with Sony and Barclays confirming further financial investment, IMS applied for the “CultureStep³³” investment programme available from A&B. The additional investment for the 2008 film production series and workshops conditioned objectives relating to engaging young people, training and development opportunities for adults and young people, social inclusion and diversity, activity in marginalised communities, and using the arts as a tool to motivate, train and develop business staff.

Compelled by these factors, Roger re-affirmed that IMS was to continue to pursue an explicit social mission rather than financial objectives. Kylie retrospectively explained:

“... development of talent, but not just any talent. Talent from the communities who wouldn’t normally have access to that sort of opportunity, to make the step into media...”

Concurrently, with the assistance from ITV Wales and Sony, Roger continued to drive the scheme’s development in terms of film production expertise. Introduced through Sony, IMS partnered with Dragon Digital Intermediate and developed the scheme’s first 30 minute film in an HD format, in addition to the established six shorts, plus a documentary, co-produced with ITV Wales.

Production of the 2008 series engaged more than 2,000 young people and resulted in eight films being made. It included five short films in English and one in Welsh, the documentary portraying the making of the films, plus the new format of a 30 minute HD film, *Pleasure Park*. The filming took place in June 2008. This *“most challenging project yet”* (Roger) featured a crew of more than 40 trainees, supported by industry heads of departments, and was joined by a cast of acting students and professional actors, including

³³ CultureStep is an investment programme created by Arts and Business Cymru with funding from the Welsh Assembly Government, aimed at increasing private sector support for the arts across Wales. It aims to encourage new investments and grow established business engagement with the arts. Under the programme, arts organisation can apply for funding that complements the sponsorship secured from the private sector. The magnitude of funding is dependent on the length of time the respective business has been involved in supporting the arts in Wales. The investment ranges from £1 investment for every £2 of business investment in new relationships, to £1 for every £3 and £4, respectively, as the business support matures.

Richard Harrington³⁴ and Jan Anderson. The rest of the films were shot during July and August throughout South and West Wales.

In the meantime, as part of the Barclays collaboration, a series of workshops took place regarding budgeting, spending, saving and investing, avoiding debt and obtaining value for money in general and in the context of film finance management. In addition, one trainee per short film was selected to manage the budget for the respective film and 25 trainees were tasked with the financial and organisational management of the annual round table event of the premiere of the films. The Barclays collaboration was highly effective in transferring practical business skills to the scheme's trainees, endowing the trainees with fundamental life skills.

6.2.5.4 The crisis

In September 2008, FTSE 100 relegated ITV from the index of UK's largest publicly listed companies, exposing the company's financial difficulties. Shortly afterwards, ITV announced a reduction in the regional programmes, including significant cuts in the Welsh non-news programming. IMS was informed that ITV Wales would no longer be able to support the scheme to any extent, withdrawing the financial support, the broadcasting of the films and the provision of a base at its centre. Faced with an uncertain future, Roger began to champion IMS in his role as a talent consultant at BBC Wales. Roger's line manager at BBC Wales, the Director of Arts and Factual Programming, Ceri Sherlock, was familiar with the work of IMS through prior personal engagement. Conscious of the achievements of both the social and professional aspects, and aware of the difficulties arising from the dissolution of the ITV Wales collaboration, Ceri Sherlock assumed the role of the "champion" of the scheme.

Representatives from BBC Wales were invited to the 2008 annual showcase in late October 2008. At the ceremony, a number of high profile speakers paid homage to the support that ITV Wales had provided to IMS over the years, and the BBC executives were made aware of the difficulties the scheme was facing. The premiere gave the trainees an

³⁴ Richard Harrington is a Welsh, BAFTA Cymru award-winning actor. He has had roles in numerous TV series and movies, including Bleak House, Coronation Street, Spooks, Casualty, Holby City, Hustle, Dziel and Pascoe, and Silent Witness, etc.

ideal opportunity to showcase their talent and new skills to the partners, as well as to their own families and teachers. Lorraine Turner, a mentor from a partnering organisation Film 15 commented on this unique impact:

“...young people get so much out of the experience. So many of the young people who have been doubted by their teachers and highlighted as cause for concern, doing really badly at school, have astounded their teachers when they created such wonderful work...”

The event provided a unique platform for the trainees to exploit their interpersonal skills to network with influential individuals from the industry, vital for gaining a foothold in the fiercely competitive creative sector. Commenting on a first-hand experience as a former trainee, Victoria Stephens³⁵ interposed that the convivial atmosphere where *“councillors and parents and teachers and all these different people come together to all join in the admiration of something that other people have done... I think that’s really good for bridging gaps between different sections of society”*.

The films were subsequently screened on ITV Wales in November and December 2008, marking the official dissolution of the ITV collaboration, with no potential for the restoration of the relationship in the foreseeable future. A highly productive year had culminated into a struggle for survival.

Broadcasting the trainees’ work was at the core of the scheme’s identity and formed a crucial part of the profile. The future of IMS was uncertain as Roger explained:

“... without that relationship with a broadcaster, it’d be really difficult... there wasn’t a champion... and we hadn’t had that much support from the Assembly then and we did feel, erm, it was gonna be difficult to continue...”

The dissolution of the collaboration also entailed the loss of funding for the role of Rebecca Davies. With no security of employment, Rebecca left IMS after three years of

³⁵ Victoria Stephens was employed as a Community Projects Coordinator at IMS in late 2011, having started at the scheme as a trainee Assistant Director.

service in 2009. However, the ITV Producer Lisa Edwards remained at IMS as a mentor in a private capacity.

6.2.5.5 Developing a Business Plan

To help secure the operations, the first complete IMS Business Plan (BP) was produced in November 2008, with the help of the business partners. The BP outlined the achievements and affirmed the progress from a local project into a National Short Film Scheme for Wales, clarifying that the main area of expertise was in short film training. The BP confirmed that IMS would continue its commitment to inclusivity through working with people from a variety of backgrounds and skills levels.

The target audience comprised individuals from current and future partner schools, youth theatres, colleges and universities, as well as the local community and arts groups. Following a series of community workshops, most scripts and new entrants were selected from communities looking for a 'voice'. Their story would be communicated through the production of a mix of short- and medium-length films and documentaries to be broadcast on national television. Community re-generation through developing individual skills, raising awareness of and within communities, and stirring creative activity became the centre of the mission for IMS.

Seven primary objectives were introduced for 2009 and beyond, to reach the aim of operating at three skills levels: new entrants, 16–25 and over 25 (see table 10 for objectives).

Table 10: IMS objectives listed in Business Plan 2009

IMS Objectives – Business Plan 2009	
i.	to operate at three skills levels – New Entrants, 16–25 and 25+
ii.	to raise awareness of the practical and business opportunities in film and television to local communities who would not normally have access to such information
iii.	to train young people in above-the-line and below-the-line film positions, developing both hard and soft skills and creating pathways for career development
iv.	to furnish trainees with effective practical, business, financial and communicative skills that would help them gain employment in the industry
v.	to provide industry mentoring to trainees from working professionals
vi.	to expose and facilitate logical pathways to FE students hoping to go on to study at HE level in film and television
vii.	to encourage individuals to start their own production companies through surgery sessions with business and financial experts

The targeted outcomes were twofold: personal outcomes for beneficiaries through skills development, and economic outcomes to the respective local areas, with an emphasis on initiating regeneration, entrepreneurship and income to the local area.

Financial instability was identified as the key weakness of the long-term future developments. Despite the support and contributions from numerous partners, IMS lacked sufficient core funding to employ permanent full-time staff, limiting its ability to operate as a year-round, full-time scheme:

“Core funding... is a major issues for It’s My Shout... There is no budget for a [full-time] Producer, Production Co-ordinator, or Marketing Executive, which means that company development outside production times is extremely difficult.” (IMS BP 2009: 12)

The inability to operate year-round produced gaps between projects and posed a barrier to the espoused successive professional development programme for trainees who were not students of the higher education partners.

6.2.5.6 The BBC Wales collaboration

The BP explicitly stated the magnitude of the scheme’s impact on societal development and this assisted Roger in his efforts to raise awareness of IMS at BBC Wales. Driven by Ceri Sherlock as the scheme’s champion, IMS was becoming perceived as a potentially unique pool for sourcing creative talent within BBC.

At the close of 2008, , IMS was offered patronage by BBC Wales who provided the much needed stability by taking over the broadcasting and mentoring responsibilities previously held by ITV Wales. Roger explained the atypical approach of the BBC in this relationship when working with a production company:

“... I suppose, because of my individual relationship with them, it’s a bit of a hybrid. And that’s how they term it. Like, okay, we don’t commission you but we do pay you a license fee to broadcast the films that you make for us...”

The collaborative approach was endorsed in an offer to temporarily house IMS at the BBC Wales site in Cardiff and the provision of extensive in-kind support to script editors, equipment, and advice from executives and commissioners. Initiation of this collaboration safeguarded the continuation of the creative format of film and media training. The reciprocal nature of the relationship was affirmed by Cathryn Allen, Head of Broadcast and Development at BBC Wales, at a later IMS premier, when she described the IMS collaboration as *“an important part of how we find our talent and create connections with individuals and communities across Wales.”*

Having safeguarded the essence of IMS and in need of an operations manager, Roger contacted Kylie in early 2009, with an offer to return to IMS. Kylie conditioned her return on being offered a permanent employment contract by IMS, rather than returning as a freelancer.

Kylie returned to IMS as the first official employee on payroll and as the part-time Projects and Production Manager, she co-managed the transition from ITV Wales to BBC Wales, marking a new era with Roger as the Head and Executive Producer. Ceri Sherlock extended his support to act as the Executive Producer on IMS projects produced under the BBC Wales flag.

As an outcome of the BP, inclusivity became more explicit and open access was afforded to anyone in all areas of activity. IMS began to hold open access auditions and workshops in different communities throughout Wales. Callouts were announced on the scheme’s website and made publicly available through social media and local newspapers. Collaborations with different schools and colleges, agencies and community centres continued to ensure a widespread awareness of the activities.

The communities showed approval of the inclusive approach, as described by a parent of one of the “new entrant” teenage trainees:

“... I mean, when you’re living in the Valleys, things like this are not generally accessible to us. And all of the sudden we have local kids performing in a film that’s gonna be broadcast. And what it does for the kids is absolutely brilliant...”

In April 2009, the efforts of IMS to develop young people both vocationally and personally with the help of their collaborating partners were again recognised at the A&B

awards. Barclays was presented with the “Arts, Business and Young People”³⁶ award for continued collaboration with IMS. The note accompanying the award read: “*The judges were bowled over by the powerful and tangible impact the sponsorship had on the lives of young people*”. The award benefited both the business supporters and IMS by raising awareness of the brands and enhancing their image, and it introduced the core capabilities of the organisations to other members of the A&B community, as well as to the high profile guests attendant at the ceremony.

The first year of the BBC Wales collaboration saw the summer short films series renamed “Made in Wales” and extended to seven short films, plus the customary “making of” documentary. The series featured a further progress in film production expertise. IMS teamed up with a business partner, Ganymede Productions, and developed the first VFX³⁷ film. “Reign of Death”, a sci-fi noir film, was written and directed by Matthew Savage, an established filmmaker whose filmmaking career was launched when he was identified by IMS as having the potential to work with the scheme’s partner, UK Film Council, on future projects.

The film starred the BAFTA award winner Noel Clarke as the leading actor and became a viral hit shortly after its screening at the annual showcase in late October 2009. All short films were subsequently broadcast on BBC Wales in November and December 2009.

6.2.5.7 *The crisis deepens*

At the close of 2009, the unprecedented downturn in the UK economy was evident in the increasingly difficult operating conditions. The lack of sufficient core funding identified in the BP continued throughout 2009 and cash flow became difficult to manage. The budgetary challenges were exacerbated after BBC Wales notified IMS of its intentions to scale back the support, following an essential re-structure. The BBC was no longer able to house IMS so alternative offices needed to be rented externally from early 2010.

The restructuring process at BBC Wales resulted in Elis Owen ‘crossing over’ from ITV Wales to become the Head of Commissioning at BBC Wales in November 2009. Despite the

³⁶The Arts, Business and Young People award is awarded to a business in recognition of its collaborative efforts that harness the power of the arts to engage young people.

³⁷VFX – short for visual effects – describes the various processes by which imagery is created and/or manipulated outside the context of a live action shoot.

inability to restore the base for IMS, Elis Owen promptly resumed his patronage over IMS and integrated its development as part of his remit at BBC Wales. He also became the Executive Producer for IMS Productions at BBC Wales. Under Elis Owen's command, the BBC remained the principal broadcast partner with the film production arrangements unaffected.

In early 2010, IMS relocated to independent premises, liable for full rental payments. IMS lacked the secure public sector funding needed to sustain the challenging operations and weather the diminishing private sector streams of income. The unprecedented financial pressures and the negative economic developments in the external environment were beginning to threaten the positive socio-economic impact of IMS. Kylie retrospectively related the problematic operational conditions to the structure of the funding provided by the partners:

"... Our funding then came from the broadcasters and local authorities but that is our deliverables, whether it's a programme or a certain number of workshops, but that does not include the costings for the running of the organisation..."

With the exception of Sony, most income was largely derived from projects that were insufficient to cover the increased costs. The mounting financial pressures required a re-think in terms of the long-term strategy. A decision was made in early 2010 that saw a reduction in the number of films produced in the "Made in Wales 2010" series, to six short films, plus the documentary.

6.2.6 Professionalising phase: Transforming stage 2010 – January 2011 and beyond

For the first time since the inception, the direct socio-economic and value-adding potential of IMS decreased with the reduced number of trainees recruited for the 2010 series. The problematic operational costs and the erratic cash flow reflected the unfavourable macroeconomic environment and required a re-assessment of the arrangements.

With less time spent on projects, Roger and Kylie were able to devise a new strategic plan with a more concrete funding structure and operation processes. Identifying novel streams of income took precedence. Aware of an emergent UK government backed framework of creative apprenticeships that was being developed by Creative & Cultural Skills³⁸, Roger recognised that the programme was fully compatible with the scheme's core activity and represented a significant innovative source of income. The programme offered stability through creating new funding streams and also represented an opportunity to gain formal qualifications for selected trainees.

If successful, IMS would secure core funding that would enable year-round operations to cater for the apprentices' continual development.

6.2.6.1 Overcoming the crisis – The Sony collaboration intensifies

Meanwhile, the Sony collaboration matured into an effective relationship. The high levels of commitment and trust proved “existential” for IMS. With the initial two-year sponsorship having lapsed at the close of 2009, Sony confirmed that it would remain the principal corporate partner. Steve Dalton rationalised Sony's continued commitment:

“... IMS is a very important scheme to gather lots of different people, from different areas across different age groups from all communities in Wales and let them come together as one and where they can learn lifelong skills...”

Through a shared interest in providing creative opportunities for marginalised groups in Wales, the two leaders developed a close acquaintance outside the work environment. The familiarity became the conduit of the “*very good informal relationship*” between Sony and IMS. Roger explained:

³⁸ Creative and Cultural Skills is the licensed Sector Skills Council for the UK's creative and cultural industries and was established in 2004. A new licence to operate was granted in January 2010 by the government in order to encourage sustainability within the creative and cultural industries through training and skills development (ccskills.org.uk).

“... in all honesty, it probably is conversations that I’d had one to one with Steve... there’ll be times when he’d invite me and my wife to corporate evenings or other things. Although that’s a social occasion, it’s also when you can discuss things and developments... yeah, a personal relationship is important...”

Beyond the core financial sponsorship, in the last two years Sony had increased the support in terms of equipment and technical expertise for the film productions. Sony also initiated contacts with independent creative companies based at the “Business Incubation Centre” at Sony’s headquarters, such as Dragon DI, who subsequently became industry partners for IMS to co-produce the aforementioned first digital short in 2008.

In early 2010, Roger and Steve Dalton agreed a substantial increase in the financial sponsorship. It was based on an explicit understanding that IMS would continue to develop links with the local community in Bridgend and remain pro-active in extending opportunities to young people from all backgrounds. Roger described the meeting as *“actually a life saver”*, as it resulted in the release of two years of funding, without which *“we couldn’t have continued”*.

Sony became a major lifeline for IMS. Despite the reported informality linked to the personal ties between the executives, Roger was acutely aware of the scheme’s dependency on the principal business partner:

“... it’s important to continue to develop your communication with the company. Because if they felt that it was time for another partnership to be supported and that you’d had your run with them... Basically, the more you can get companies engaged with what you do, the better it is...”

The need to reciprocate more equally to assure Sony of the validity of the investment and to engage them more effectively in the operations developed into a major consideration for the team:

“... It’s something we’ve discussed here... We need to ensure that we are in constant touch with them, in some way or another. Inviting them to workshops or to screenings or to occasions that might be appropriate for them. As well as asking

them if there's anything that they want us to provide for any of the activities that they've got..."

IMS matured into a position to supplement the traditional marketing and branding benefits by the more developed expertise and core capabilities. The wide-ranging network of dedicated partners and supporters built up over the years was mobilised. Sony was introduced to other creative organisations in the local area and this helped to advance Sony's community involvement programme. The annual showcase offered a platform for Sony's senior executives to get acquainted with representatives of the scheme's partners, including BBC Wales and the Welsh Assembly Government (WAG), in an informal setting. Roger Burnell explained:

"... [Sony] would see the benefits that we'd be able to bring to them in terms of brokering other relationships. And we do discuss that... who sits on their table, or who would be coming to an event..."

Moreover, aware of the necessity to provide year-round hands-on training opportunities to comply with the creative apprenticeship requirements, IMS approached Sony with the view of creating novel opportunities for the trainees. The previous year had seen IMS trainees assist at different events at Sony, and the new venture developed this into a more formal arrangement.

The programme saw selected trainees appointed to organise entertainment at Sony's corporate events and assist in producing Sony's corporate videos. The unique venture provided the trainees with practical opportunities to apply the learned skills, and develop new and further existing competencies in a high profile corporate environment. It also increased the interactions between the organisations.

Following an impressive singing performance at Sony's Christmas party by one of the trainees, an offer was extended by Sony to broker an introduction with Sony Music in New York, with the view of initiating a potential solo career in music for the talented trainee. The highly interrelated approach proved to be, in Roger Burnell's words, a unique opportunity for *"... amazing connections that could be made possible..."* as an outcome of two like-minded organisations working together.

The mutual reciprocity that generated a combination of immediate and latent benefits for both partners and the local community, culminated into an increase in the level of engagement between the organisations. Both organisations were committed to continued mutually beneficial collaboration, yet Sony essentially retained the upper hand.

In summer 2010, Steve Dalton invited Roger to meet the President of Sony International, Sir Howard Stringer, and with the help of the trainees, to introduce the scheme's work. Following the presentation of the scheme's achievements and aims, the leaders discussed how the collaboration could be developed further to a mutual advantage, including the possibility of growing IMS internationally. Although no concrete plans were confirmed, shortly after the meeting, Sony extended an offer to house IMS at the Business Incubation Centre at the technology centre in Pencoed at significantly subsidised rates.

IMS relocated to the Sony Technology Centre in late October 2010 which significantly reduced operational costs and instilled a sense of stability in future growth. Kylie explained:

"... Now that we are based here (Sony), we're engrained ... Steve (Dalton) will come in here every now and then and talks to us about what we're doing..."

Being a tenant afforded IMS a *"certain amount of independence"* whilst remaining *"physically close to any decision making"*. The new base provided *"a natural sort of opening up of communication"* between Sony and the scheme's other partners as and when they visited the offices.

6.2.6.2 The First Minister of Wales Lends Stature

The annual showcase in late October welcomed the newly elected First Minister of Wales, Carwyn Jones. The Bridgend born First Minister addressed the audience at the showcase praising the participants as a *"credit to their communities"* and pledged support

for the scheme's long-term stability.³⁹ The fundamental role played by the business partners in sustaining the scheme was also raised in the speech:

"... We know that IMS relies on the enthusiasm of so many people who give up so much of their spare time. But it also relies of course on sponsors, on people who are willing to back such an important project. And I want to add my thanks to all the people who sponsored IMS and provided the ease by which IMS can not only flourish in Bridgend, but can flourish across the whole of Wales..."

The advantage of having a leading political figure as a personal supporter was highlighted by Roger when he stressed the reciprocal benefits for the business partners:

"...the First Minister engages with our partners at a social level. He engages with them at even, I suppose, a strategic level, sort of discussing what they do, what we do, how we support the development of the apprenticeship scheme with the Welsh government, how that links into the development of for example, Sony's strategy..."

The strategic advantage of informally discussing the wider business of the partners with the First Minister during IMS strategic development meetings formed a key part of its unique capabilities.

6.2.6.3 The apprenticeships programme

With the security of core funding from Sony and the backing of the First Minister, Roger steered the scheme's direction towards the espoused step-wise professional development format. IMS joined a group of Welsh creative industries organisations in a pilot Creative Apprenticeships Programme. In October 2010, in partnership with Coleg Morgannwg, IMS offered three creative apprenticeship placements, part-funded by the

³⁹ Carwyn Jones remains an avid personal supporter of IMS and also promotes that socio-economic impact of the scheme in Wales in his role as the First Minister. He regularly attends the annual showcase where he takes on the role of a keynote speaker and presents awards to the successful trainees. He also lends a hand by attending strategic meetings with existing and potential partners.

WAG. The apprenticeships enabled individual trainees to pursue formal qualifications built using National Occupational Standards, and successfully embark on career paths in the creative industries. Apprentice Rosie Berry explained:

"... During my apprenticeship in costume and wardrobe with It's My Shout productions I discovered my love and passion for all aspects of the costume industry. I'm currently studying towards a qualification in costume construction at Coleg Morgannwg..."

Although the apprenticeships entailed a pre-set progression structure, IMS managed to retain its flexible approach to training by encouraging self-motivation and taking ownership in the learning process. The trainees worked on developing a portfolio of skills, both soft and hard, as opposed to a narrow focus on vocational training.

The apprenticeships provided credentials for IMS's profile as a government recognised and endorsed national training scheme for film and media, supported by industry and broadcasters.

In early 2011, the apprentices facilitated the essential changes in the operational structure. With the daily operations delegated to the apprentices, Kylie was able to assist Roger with the strategic developments. The unique benefits consistently delivered to the partners firmly secured the key relationships with Sony and BBC Wales.

Advancement in the CSR policy at the Sony UK Technology Centre in 2011 proffered further strengthening of the relationship. The progress would see the CSR policy extended to incorporate a volunteer programme on company time. The major step since the establishment of the first official CSR committee in late 2009 was explained by Sony's CSR committee member, Francesca Tavarone:

"... We were kind of reactive before... the requests used to go through to our General Manager and to [MD]. And their diaries were getting too full, so they put together the committee to filter through them. So we were quite reactive then, but now we've decided to be a little more proactive and think of ways of how we can actually improve our CSR, how we can actually make a difference in the community and to

our staff on site. And the mentoring programme was something that came up... something we should be involved in..."

The progress affirmed Sony's commitment to the continued integration of the scheme into the long-term strategic planning. Together with the perceived security of the BBC Wales collaboration, the developments provided the necessary long-term financial stability to secure Kylie's position within the scheme. Kylie's part-time contract transferred to a full-time, permanent position with the remit extended to strategic developments of IMS following her return from an extended break in January 2011. It essentially fully secured her career progression within the creative industries.

6.2.7 The Legacy

By the end of January 2011⁴⁰, IMS produced 50 short films which have been broadcast on ITV Wales and BBC Wales, respectively. Two films won the BAFTA Cymru awards for Best Short Film and many have been shortlisted for screening and nominated for awards at a multitude of UK and international film festivals. The scheme also produced numerous short films with different community organisations that featured the community members and were screened throughout community centres in Wales.

⁴⁰ Since completing the case study, IMS has firmly established its operations in North Wales, and has employed a co-ordinator. It has produced a number of award-winning short films, which have been screened throughout UK and Europe. The short film "Sweet Sixteen" from the 2011 series was awarded a BAFTA Cymru in the Short Form and Animation category in 2012. Another short in the 2011 series was voted as "runner up" in the Short Film Category at Screen Stockport Film Festival. It has also been chosen for screenings at festivals in Australia and Germany.

IMS has also firmly established its community outreach programme and employed Victoria Stephens as a full-time Community Projects Co-ordinator. She initially joined IMS as a trainee Assistant Director in 2011 and was approached by Roger and Kylie to help with the community project in addition to her vocational training.

The creative remit of the scheme also extended. Roger Burnell was asked in 2012 to take over the running of Bridgend Youth Theatre (BYT) under the IMS flag. IMS took leadership of the theatre in late 2012 and employed Naomi Roberts as a co-ordinator for BYT. IMS runs paid for workshops under the BYT, providing further streams of income for the organisation. Together with the apprenticeship scheme, this enterprising approach to the management ensures stability and future long-term sustainability of IMS.

In October 2012, IMS celebrated its 10th anniversary at a gala premier evening at the Wales Millennium Centre in Cardiff. In front of hundreds of current and former trainees, the scheme's partners, leading figures of the Welsh political scene, including the First Minister Carwyn Jones, and many celebrities who support the scheme, Roger Burnell was presented with an award for his long-term commitment to driving creative talent in Wales.

With the help of short- and long-term partners, Roger and Kylie developed IMS into a professional creative industries training scheme. Having earned recognition by the WAG for the positive socio-economic impact and the ability to drive the reputation of Wales on an international platform, IMS is fully recognised by the industry for producing high quality artistic product and for its valued contributions to developing creative talent in Wales. An estimated 80 percent of directors, 60 percent of writers and 40 percent of actors who trained at IMS, have gone on to find paid work in the industry. John McGrath, the Artistic Director at the National Theatre of Wales affirmed that the films produced are an excellent tool for the trainees *“to let us know about their work, whether that’s as an actor, writer or director”*.

The original intention to develop individuals through creativity, however, remains unchallenged as Kylie says:

“... It’s not necessarily our ultimate aim that everybody gets a job in the industry. It’s what they achieve by getting there, and the skills that they learn that could be instrumental in other areas of their lives... the confidence to do something else...”

Throughout the evolution, IMS has retained its social ethos by firmly endorsing inclusivity in access to the creative industries and providing a voice to marginalised communities in society.

The often life changing impact IMS imparts was illustrated by Kylie:

“... [trainee director] knew individuals within [place name] community as well, who he asked if they could come on as supporting actors, even people with lines. So we had, erm, [AC] who was the shop keeper in one of the films and he got a lot from it as well... And he is a, he is the cleaner at BBC Wales... And the Head of BBC Wales was sort of..., and he’d won the best supporting artist. So, the Head of BBC Wales Rhodri Talfan Davies who’s going to do a presentation on [stated short film] what he’s going to do, he’s going to ask [AC] to come in and help him with the presentation. Which is really nice and obviously, he’s a cleaner and he’s, you know, he’s breaking down those boundaries as well...”

Individual trainees also voiced their appreciation of the long-term benefits and life skills gained through participation:

“... [IMS] has given me the confidence to like believe in myself and like, to be... you know, to be bigger than I am. To like, have faith in myself that I can succeed, like. Having this [best supporting actress award] and having the opportunity to do all this, it’s like, it is like once in a lifetime opportunity, um, you know, not many people get it. And, it’s like, it’s amazing...” [teenage trainee]

The positive impact on the trainees and other participants was repeatedly acknowledged by the individuals’ social networks, including their parents:

“... It’s the first time [son] has done anything like this and he was a bit overwhelmed to start off with, and I’ve got to be honest I was too... but I can’t really express how proud I’m off him. We are all proud of our kids at different times and that, but this really is the icing on the cake... and I can only hope now that that it has planted a seed for him to go on to do bigger and better things...” [parent of a teenage trainee]

and teachers:

“... So many of the young people that have been doubted by their teachers and highlighted as ‘cause for concern’ have astounded them when they’ve created such wonderful work...” [Film 15 employee]

The achievements and recognition, and the support of the media, industry, education, training, local governments and business partners symbolise that IMS fulfils an *“important role in terms of the development of communities, development of talent, that whole niche we have developed... sort of enrichment of Wales”* (Roger). The artistic output forms an essential aspect of IMS and the outcomes of the work in terms of enhancing the aesthetic aspects of society is at the heart of IMS as expressed by Roger:

“... it helps when you’re able to show that you can make things that are essentially good, which have an essential value in themselves... um... I think that always has been important...”

The team and its supporters are currently working on developing IMS into a UK wide scheme. Pending self-sustainability, the long-term opportunity of pursuing a strategy constructed around a small number of highly integrated collaborative relationships continues to be the panacea at IMS on the account of organisational stability, both financial and creative development.

6.3 Case Conclusion

The case study demonstrates that societal collaborative value creation is bound by the dynamic interconnectedness of the inner and outer environments beyond the initial convergence on the issues of creativity in society (Pettigrew 1997). The chronological framework aids in tracing the sequence of events and actions that link the processes to outcomes, whilst evidencing the different ways the interacting elements influence the organisational processes and outcomes at different points of the evolutionary stages (Stake 1995).

The evolution of the collaborative strategy of IMS evidences a story of “becoming” a national short film scheme (Pettigrew 1997) through the manifold degree of assistance from the business partners, whilst imparting, directly or through value slippage (Lepak et al. 2007), progressively more significant socio-economic benefits. Tracing the multifarious interaction processes that underpinned the Emerging and Professionalising phases, respectively, provides significant insight into collaborative value creation that can be considered as benefitting society.

This case study empirically demonstrates that the underlying mechanism that stimulates the processes of social value creation are driven by human factor, i.e. human action and interaction forms the basis of all processes and outcomes in social reality.

The reported negativities in the macro environment purportedly denote causation in terms of the emergence of alliances with the private sector. However, Roger’s influence and

interpersonal interactions with similarly minded individuals induced the convergence of the internal and external contexts. This illustrates that the alliances produce outcomes that are socially constructed as opposed to being a mere outcome of causality.

Roger's unrelenting enthusiasm is evident in his comment below:

"...my passion with regard to developing new talent, particularly in areas of social deprivation if you know what I mean. And to increase the demographic share for, you know, inclusivity in terms of working class involvement in the creative industries...";

exposes how contextual environments and human networks can be mobilised, and worldviews linked with specific career choice transgressed by social actors to pursue outcomes and create social realities that they personally see as important (Hemingway 2005).

The accomplishments throughout the Emerging and Professionalising phases, as well as the future predictions, point to a decidedly positive contribution of the collaborative strategy to the advancement of creativity. These exemplify an arguably significant societal impact of the scheme in terms of its creative outcomes or arts for arts' sake. Together with the overt social mission of using the arts as a developmental tool, the scheme exemplifies both sides of the "what good are the arts?" debate (c.f. Carey 2005). The experience of IMS demonstrates that the perceived dichotomy between the two notions is misguided. According to Şişmanyazici-Navaie (2004), the two facets of the capacity of the arts are complementary rather than mutually exclusive.

Collaborative strategy became a mainstay of the strategy as explicated by the MD:

"HK: Do you feel that there is something that you couldn't achieve without Sony's support?"

RB: Well, we couldn't... exist I suppose."(Roger)

The evident financial dependency on the partners, particularly on Sony, continues to represent an imminent threat to the scheme's existence, essentially leaving the social good produced on a whim of the business partner. The perceived myopic approach to entrusting

the scheme's financial stability to the business partner seemingly prevents novel solutions to moving towards self-sustainability. When asked what impact a sudden ending of the relationship with Sony would have for IMS, Roger's deliberations pointed to some potentially viable solutions:

"... We'd have to physically base ourselves elsewhere. Would that allow strategically more of a national conception of what we're doing? Maybe... Erm, and also I suppose it would just make us look at how we are maintained, maybe we would then look for stronger links with another broadcaster, with government agencies, such as the Arts Council or the Film Agency..."

Nevertheless, the current approach focused on strengthening the collaborative strategy progressively yields more significant levels of social good.

6.4 Summary

This chapter narrated a story of the evolution of IMS, a community arts organisation by chronologically tracing the major changes and developments in the organisational structure, people's actions, events and processes as structured around two key development phases, the Emerging and Professionalising phases. The phases were further separated into Emerging and Learning stages; and Transferring, Enterprising and Transforming stages that marked the progressive organisational learning that resulted in a co-creation of sustainable collaborative value for society. The next chapter will offer a conceptualisation of the narrative in light of the research agenda presented in chapter 4 and informed by analyses of each stage available in appendix 12.

CHAPTER 7: CASE STUDY CONCEPTUALISATION

“We cannot even know if reality is consistent with sense data, because we only perceive what is already consistent.”(Angell & Demetis 2010)

7.1 Introduction

The case study presented in chapter 6 provides a number of empirical observations on the evolution of IMS, a community arts organisation. IMS contributes to societal betterment by pursuing a collaborative strategy with business, inter alia. This chapter considers the contribution of the case study to understanding societal value creation through nonprofit community arts and business collaboration. It derives the possible function of the different types of benefits⁴¹ as operands of the different types of collaborative value, their respective capacity to induce societal betterment and the conditions through which they arise. The understanding is constructed in light of pertinent academic thinking as presented in the literature reviewed in chapters 2, 3 and 4 and guided by analyses of each stage⁴². It is presented in the form of propositions that form five principal themes that arise from the endeavours to construct novel concepts from the consort of grounded observations and contemporary academic thinking. The five themes and the respective propositions are summarised in table 11.

Table 11: Summary of themes and propositions – case study conceptualisation

	Theme descriptor	Propositions
Theme 1	Target beneficiary role	1: Target beneficiary is a co-creator of collaborative value in the arts context due to the relational process of producing artistic value. As co-creators of collaborative value, value generated at the target beneficiary level in the arts context is internal to the collaborative action, not external to it.
Theme 2	Transactional collaboration approaches	2: Hybrid transactional NPO-business relationships in arts context are distinct from traditional transactional relationships in capability to generate value for society. In contrast with operational tactics in

⁴¹ See appendix 13 for delineated episodic and cached, internal and external benefits indicators.

⁴² See appendix 12 – Analysis of evolutionary stages of IMS

		traditional transactional relationships, transactional hybrids are socially oriented, strategically combine distinct competencies and exhibit high levels of engagement across company hierarchies. Transactional hybrids can generate value conducive to societal betterment.
Theme 3	Transactional collaboration value modes and classes of value	<p>3: In the arts context, benefits occur in two forms: episodic benefits and cached benefits.</p> <p>3a: Benefits that produce instant, yet ephemeral and marginal advantage are episodic, and create transient value mode.</p> <p>3b: Cached benefits that accrue with a time delay but are enduring and formative are distinct from episodic benefits as operands of collaborative value; cached benefits produce cumulative value.</p> <p>4: Cumulative social value and cumulative societal value are distinct classes of value in arts and business collaboration.</p> <p>4a: Cumulative value that generates systemic solutions beneficial to a wide range of constituents within and outside the collaborative portfolio is societal rather than social. Cumulative social value lacks the capacity to transfer across locations of value creation; it denotes value generated within the collaborative arrangements.</p>
Theme 4	Principle and moderators of cumulative societal value creation through transactional collaboration	<p>5: In the arts context, generating societal value is not dependent on a single dyadic relationship that evolves over time. Cumulative societal value can emerge through a portfolio of parallel and/or consecutive transactional relationships developed by an arts organisation over time.</p> <p>6: The capability of an arts organisation to generate cumulative societal value through a portfolio of transactional relationships is principled by specific organisational and individual level conditions.</p> <p>6a: On the organisational level, societal value creation in transactional portfolios is moderated by: i) the mission of the focal arts organisation remains unchanged and the purpose of the collaboration in every relationships centres on attaining the mission, ii) organisational learning at the focal arts organisation supports the integration of transactional hybrids in the portfolio; iii) transactional hybrids form part of the portfolio as they facilitate societal value generation through innovation.</p>

		6b) On the individual level, multilevel individuals share in the socially oriented artistic mission that underpins the collaboration and are committed to its attainment as follows: i) executives facilitate and support the existence of such collaboration; ii) employees' commitment is secured; iii) internal and external beneficiaries self-select and participate proactively.
Theme 5	Functions of business partner in societal value creation	<p>7: In the arts context, the role of the business partner as a benefits provider (co-creator) is distinct from the role of a benefits facilitator in generating societal value.</p> <p>7a: Business partner that participates in the social value generating activity directly and pro-actively acts as a benefits provider (co-creator). Arm's length, reactive approaches typify benefits facilitator.</p> <p>7b: Organisational learning mediates the role of the business partner in creating cumulative societal.</p>

7.2 Transactional collaboration and societal value creation: some propositions

The analysis of the empirical observations presented in the case study yielded five distinct, yet interrelated themes that informed the construction of the initial framework. The framework aims to provide an understanding of value creation through transactional collaboration between nonprofit community arts organisations and business that contribute to societal betterment. The study aim and objectives presented in chapter 4 guided this conceptualisation. The five themes are: target beneficiary role; transactional collaboration approaches; transactional collaboration value modes and classes; principles of societal value creation through transactional approaches; and functions of the business partner. These will be discussed next.

7.2.1 Target beneficiary role

The empirical observations in this study are consistent with prior conceptualisations in NPO-business collaboration literature. Benefits emerge at individual (micro),

organisational (meso), and wider societal (macro) levels (Selsky and Parker 2005; Kolk et al. 2010; Austin and Seitanidi 2014). The arts context validates Seitanidi's (2010) view. Beyond the partnering organisations, NPO-business collaborations produce social outcomes that relate to the work of the NPO, and societal outcomes derived from the partners' combined efforts which are delivered externally. The findings further support Austin and Seitanidi's (2014) theorising. Two locations of collaborative value – within the collaborative action, and external to it can be discerned. The role of individuals is also recognised as the fundamental constituent contributing to the effectiveness of relationships and their value generating capacities (Bhattacharya et al. 2009; Vock et al. 2011).

However, the findings here contradict the current understanding of the individual level classification in creating value through collaboration. The individual level broadly includes target beneficiaries of the social purpose of the NPO, senior executives, managers and employees at the partnering organisations, and individuals within wider society with no direct affiliation with the collaboration. Currently, the most comprehensive framework proposed by Austin and Seitanidi (2010) approaches value creation largely from the organisation-centric standpoint, although it acknowledges the need for individual level understanding. From this perspective, value creation related to executives, managers and employees occurs internally to the collaborative action, as the organisations are the pioneers who came together to create value. Their active engagement is fundamental to the value creation process. This study concurs with this theorising.

However, Austin and Seitanidi's (2014) framework locates value related to the target beneficiaries outside the collaborative action. It assumes that the target beneficiary is someone with "needs that are attended by the collaborating partners" (Austin and Seitanidi 2011: 8). The benefits acquired by the target beneficiaries comprise 'macro level' value – i.e. value created for a constituent located outside of the collaborative arrangement (Waddock 1988; Austin and Seitanidi 2014). The interpretation of the case study is inconsistent with this organisation-centric conceptualisation. This study focused explicitly on integrating the target beneficiary perspective with the organisational in a specific case study setting as suggested by Le Ber and Branzei (2010a). This allowed a closer examination of how value for society actually emerges on the micro level in the arts context, rather than assuming a priori the internal (employees, managers) and external (target beneficiaries) classification.

In the arts context, creating value for society is underpinned by the production of artistic value (DiMaggio 1987). Examining how value for society emerges through collaboration, therefore, needs to start by considering how artistic value is produced and by whom. The findings demonstrate that as the target beneficiaries, IMS trainees actively partook in the process of producing collaborative value. The trainees' willingness to participate in the creative processes was instrumental to the emergence of artistic value. This is consistent with Sicca's (2000) view. The process of producing artistic value relies on the activity of 'prosuming' – artistic value emerges only once the beneficiary has proactively engaged in the production process. The findings further support the relational perspective of artistic value creation promulgated by Schusterman (2001) and Boorsma (2006). The relational perspective in the arts requires "constructive, creative activity by the art [beneficiary] ... value is not created for the [beneficiary], but created in co-operation with [them]" (Boorsma 2006: 78). The willingness of trainees to engage in the artistic value production process essentially underpinned the existence and professional progression of IMS. As argued by Boorsma (2006), the ability of the organisation to attain its artistic mission is contingent on the co-creation response by the beneficiaries. Lack of effort on the trainees' part would have impinged on the emergence and the quality of the artistic output, as well as the magnitude of subsequent socio-economic benefits generated. The steady progress in the evolution of IMS into a professional creative industries training organisation capable of contributing to societal betterment would have been restricted.

The case demonstrates that the quality of the artistic output, the skills and locus of control developed by the trainees through engaging in the creative process form the antecedent of all subsequent value generated by IMS. This applies both to the sole creation efforts and to the value created through collaboration with business. This is consistent with current theorising that individuals play a central role in understanding value creation generally (Vargo 2011) and in NPO-business collaboration specifically (Kolk et al. 2010). The different life skills and vocational skills, together with the personal growth and improved opportunities gained by the trainees, result from the initial artistic value co-creation process. The feelings of achievement and fulfilment on an individual level then stimulate further personal development, and feelings of reciprocity (Blau 1964; Molm et al. 2007).

The value generated on a micro level has the potential to induce subsequent benefits and positive reactions both within and across the value creation domains (Kolk et

al. 2010; Vock et al. 2011). Similarly to the findings of Vock et al. (2011) that benefits acquired from collaboration by business employees can have a positive effect on the customers' evaluation of the company, this study demonstrates that the trainees conduct similar effects. For example, IMS benefited from an improved image and reputation and this attracted further industry and business partners. It also highlighted to the Welsh Government that IMS was a significant contributor to the creative policy strategy. Interaction value emerged for business partners from being recognised by diverse stakeholders as contributing towards IMS's positive social impact, both in external reputation and employee pride (Austin and Seitanidi 2014; Weinstein 2010).

The findings here, therefore, show the distinct value offering that IMS propounds to business collaborators is founded on the initial processes of prosuming (Sicca 2000) or co-creating (Boorsma 2006) artistic value with the trainees. Any collaborative value is channelled through the benefits acquired by the target beneficiaries. They form an intrinsic part of attaining the artistic and social mission at IMS. Without the co-creative response, the existence of the organisation would be futile, pre-empting the conditions that stimulated the emergence of the collaboration between IMS and its business partners. The target beneficiaries are integral to the existence of the collaboration itself, and also for any societal betterment advanced by the collaborative action. The integrated beneficiary/organisational insight within a community arts context has, therefore, enabled this complementary empirical interpretation of how value emerges in relational contexts. From this perspective, target beneficiaries function as co-creators in the process of collaborative value creation in the arts context. The value generated at the target beneficiary level through arts-business collaboration, therefore, needs to be considered as value created within the collaboration, rather than external to it.

P1: Target beneficiary is a co-creator of collaborative value in the arts context due to the relational process of producing artistic value. As co-creators of collaborative value, value generated at the target beneficiary level in the arts context is internal to the collaborative action, not external to it.

7.2.2 Transactional collaboration approaches

Scepticism abounds regarding whose welfare is being considered in CCI (e.g. Karnani 2011; Seitanidi and Ryan 2007). The social value created typically lacks 'distinctus' to induce societal betterment (Austin and Seitanidi 2011: 45). Business practitioners face accusations of 'window dressing' (Porter and Kramer 2006) and 'whitewashing' (Smith, Read and Lopez-Rodriguez 2010). NPOs come under fire for 'selling out' to business in return for easy access to financial support. The lack of accountability and relevant collaborative organisational learning within NPOs results in outcomes which provide only the temporary relief of social problems, whereas the business will benefit significantly. Recently emergent views, however, indicate that collaborative efforts generate sustainable benefits for a wide range of societal constituents by combining unique resources and competencies in a multitude of settings (Mirvis and Googins 2006; Kim 2009). The two practices indicate two distinct value modes pertaining to creating value for society.

As the case shows, the convergence of like-minded individuals in a powerful network (Austin 2000; Waddock 2008; Daellenbach et al. 2013) and improving organisational learning (Zadek 2004) enabled Roger and Kylie to make the essential transition from running an organisation characterised by financial instability to one that pursues advanced forms of collaboration with business partners. The initial reactive value receiver approach to the collaboration and creation of largely short term, transitory benefits progressed to producing benefits capable of delivering a systemic change. Although both approaches create value, the difference they make in society varies. The problem in differentiating between the different categories of benefits in the respective approaches may be a failure to link the characteristics related to timeliness, longevity, size and the resultant limit of benefits attainable to the magnitude of value created. The distinct modes of value can help differentiate between traditional, operational; and strategic, societal oriented tactics in transactional collaboration.

Purely transactional collaborations are typically associated with the ostensible focus of business on social objectives in pursuit of bottom line benefits (Wymer and Samu 2003; Seitanidi and Ryan 2007). Arts-based collaboration is characterised by a prevalence of transactional relationships (Moir and Taffler 2004; Kim 2009; Knight 2010). The resultant collaborative value lacks the endurance and power to induce societal betterment, fuelling a

persisting scepticism towards community arts and business collaboration (Wu 2003; Clarke et al. 2011). As the case study illustrates, societal value creation requires a strategic approach to the relationship where “the compensation for these greater investments in co-creation is greater value for the partners and society” (Austin and Seitanidi 2012a: 18).

The lack of experience in engaging in collaboration at the outset saw IMS as a beneficiary of business funding in return for marketing related benefits. The primary motives in the first collaboration with a business partner related to funding and publicity for IMS (Kim 2009; Weinstein 2010) and brand, image and reputation building for Barcud Derwen (O’Hagan and Harvey 2000; Weinstein 2010). A similar approach was evident in the Ethos Creative and Boomerang Media relationships. The collaboration was short term, based purely on an exchange of generic resources with little enduring advantage to anybody. Although the benefits for the individual trainees grew as the network of partners from within the industry expanded, it was as a result of greater operational efficiency at IMS rather than joint collaborative efforts. Generating social value was not the driving orientation of these business relationships.

The lack of joint value creation meant that innovative approaches to delivering social value were not supported. These collaborations generated largely organisational benefits through the manipulation of the stakeholders’ perceptions, with little enduring benefits for wider society. This approach is consistent with commercial sponsorship (Wymer and Samu 2003; Seitanidi and Ryan 2007) as a distinct type of transactional collaboration (Austin 2000). More specifically, it aligns with arts sponsorship owing to less emphasis on return on investment objectives (McNicholas 2004; Kim 2009; Knight 2010; Daellenbach et al. 2013). As suggested by Daellenbach et al. (2013: 87), arts sponsorship sits “somewhere between the more commercial sports sponsorship, and a more philanthropic social sponsorship...”

Although the objectives shift away from the primarily profit maximisation focus, the orientation remains to be one of organisational gain (Kim 2009; Weinstein 2010). The overt focus on building an enlightened image and reputation is consistent with the views LeClair and Gordon (2000) who see cost savings through image and reputation as the primary benefits of arts sponsorship. Collaboration on this level, therefore, denotes operational tactics characterised by self-interest, rather than a strategic approach to partaking in contributing to societal betterment. The value generated remains largely transient, lacking the desirable attributes for creating sustainable value for society.

Creating value for society requires strategic alignment between the collaborating organisations to produce innovation that is beneficial to a broad range of constituents in society. Berger et al. (2004) identify a “fit” between the company and the NPO as the pre-emptive forces of the value frames mismatch that typically results in superficial value. Fit includes matching of industry/product and cause, missions, resources, management, workforce, target market, cultures, cycles and evaluation; and the structural characteristics of each partner and of the relationship itself. The case study evidences that the organisational fit and objectives alignment identified a priori to the ITV Wales and Barclays collaborations formation enabled a progression towards more advanced transactional relationships. The overt social orientation, the pooling of complementary core competencies and implementation of greater engagement between the organisations' employees demonstrates a re-orientation towards a strategic approach to collaborative value creation (Austin and Seitanidi 2014).

The alignment of core competencies and proactive co-operation generated opportunities for the trainees to utilise the learnt skills through lifting the perceived industry barriers. The ability to access the industry and develop professional networks facilitated the trainees' awareness and realisation of the ability to participate in shaping and realising their future. The enduring benefits acquired by the trainees were essentially provided with a platform to accumulate into storable value.

The co-creative approach indicates a more advanced collaborative value creation driver and a greater potential to contribute to societal betterment (Austin and Seitanidi 2014). However, this co-created collaborative value was concentrated within the collaborative action, rather than directly offering benefits for a broad range of constituents located externally. Although significant social value was generated, it lacked scale to become transformative on a societal level. Nonetheless, the innovation induced through these unique, creative and financial training programmes represents external collaborative value potential. It entails an opportunity to transform traditional creative industries training on an industry-wide scale that can be tapped by individuals and organisations in wider society. Although as the case study shows neither of these collaborations honed in this opportunity, the experience of developing unique social value considerably improved organisational learning at IMS. This was subsequently utilised in the Sony collaboration to generate collaborative value externally.

This advanced form of transactional collaboration in community arts is clearly distinct from the traditional counterparts of strategic philanthropy or arts sponsorship (Kim 2009). It incorporates a variety of value contributors typical of the integrative/transformational stages of collaboration (Austin and Seitanidi 2014). Motives, levels of commitment and mutual trust, resource magnitude and management complexity, etc. are some of the key distinguishing structural and governance characteristics (Seitanidi and Ryan 2007; Kim 2009). The advanced nature of these characteristics increases the likelihood of external value to emerge and for contributions to societal betterment. “Societal betterment is the fundamental purpose for cross-sector CVC.” (Austin and Seitanidi 2012: 952).

In addition to the Barclays and ITV Wales collaboration, this novel form of collaboration is clearly illustrated in the Sony relationship. The welfare enhancing systemic change of the re-establishment of the creative apprenticeship programme in Wales was co-created with Sony. Although matched through a ‘management fit’ and, initially not considered as ‘industry fit’ (Berger et al. 2004), the initial period of the relationship was characterised by an arm’s length structure, resulting in little value for society (Rondinelli and London 2003). According to Austin (2000: 61) “as the partners experiment and grow together” full fit is discovered that progresses the capacity to create value together. Over the four years the approach to the collaboration became increasingly strategic at both organisations. The mutually developing relationship structure stimulated the awareness of and identified the unique capabilities for joint value creation. This was further enhanced by the maturing organisational learning of value creation through collaboration at both organisations (Weinstein 2010; Austin and Seitanidi 2014).

As well as generating benefits for their respective organisations and the individuals involved, i.e. co-creating social and economic value, the collaboration generated benefits across levels external to the collaborative action. The direct external value related to the opportunities for individuals, organisations and society overall to benefit from the re-established creative apprenticeships. Sony and IMS directly co-created external value and indirect external value also emerged. Through value transfer, the highly qualified trainees contributed to other organisations, individuals and the economy through disseminating the learned skills and experience in subsequent employment.

Overall then, through the more complex value contributors, the advanced transactional relationships generated a collaborative value typical of the integrative relationship dyads (Kim 2009; Austin and Seitanidi 2014). In particular, the Sony collaboration exhibited many value contributors of a social partnership once IMS reached the Transforming stage (Austin and Seitanidi 2014). However, the case shows that the financial dependence of IMS on Sony prevented full progression towards a social partnership (Seitanidi 2010) or a strategic alliance (Kim 2009). As was acknowledged by Roger Burnell, IMS wouldn't exist without Sony's support.

The implicit power imbalance lacks the equality in governance that underpins integrated and transformational collaboration (Austin 2000; Wymer and Samu 2003; Seitanidi and Ryan 2007; Kim 2009; Seitanidi 2010; Austin and Seitanidi 2014). All business relationships managed by IMS, therefore, remained transactional yet some entailed a unique set of value contributors. The Sony collaboration, together with the ITV Wales and Barclays collaborations, demonstrate the newly conceptualised nonprofit community arts and business collaboration approach and a transactional hybrid.

P2: Hybrid transactional NPO- business relationships in the arts context are distinct from traditional transactional relationships in capability to generate value for society. In contrast with operational tactics in traditional transactional relationships, transactional hybrids are socially oriented, strategically combine distinct competencies and exhibit high levels of engagement across company hierarchies. Transactional hybrids can generate value conducive to societal betterment.

7.2.3 Collaborative value modes

The value indicators are typically reported as two-fold in NPO-business collaboration literature (Nelson and Zadek 2000; Gourville and Rangan 2004; Şişmanyazıcı-Navaie and Etili 2006; Seitanidi 2010; Austin and Seitanidi 2012b). The duality relates to the propinquity to affect higher cash flows, the quantifiability of the advantage accrued (Nelson and Zadek 2000; Şişmanyazıcı-Navaie and Etili 2004), the degree of impact achieved (Wind-Cowie and Wood 2012), or a combination of them (Seitanidi 2010). Extant research lacks an

incorporation of the distinct locations of value, and a full understanding of how the different classes of benefits contribute to the emergence of value for society, beyond the economic implications. The persistent myopia in relation to the social and societal benefits is “pragmatically untenable” (Kurucz et al. 2008: 85).

“Understanding the links across the different levels of value creation and value capture is challenging” (Austin and Seitanidi 2012b: 952). Gourville and Rangan (2004) introduce the time and value categorisation but the framework only distinguishes between monetary and non-monetary benefits categorised as first and second order benefits, respectively. Although the limit of the value between the first and second order benefits is clarified as the influence on “the longer term relationships that these organizations have with their many stakeholders” (Gourville and Rangan 2004: 42), the time dimension relates simply to the expedience of the monetary benefit. The size and limit also lack clarity in terms of a distinction of the degree of change it makes in society, beyond the outcomes for the partnering organisations’ level. However, the genesis versus kinesis categorisation of the effect of change introduced by Seitanidi (2010) signals a dual effect of the value created.

The grounded observations in the case study confirm a duality in terms of the capacity of the accrued benefits to facilitate advantage across all levels within, and external to the collaborative action. To capture the multilevel properties, the benefits are classified as episodic benefits and cached benefits, akin to those tentatively titled by Austin and Seitanidi (2014) as transitory and enduring. The two categories are distinct by four mutually interacting dimensions: time, in terms of when the advantage can be harvested; the durability of the benefits accrued; limit, i.e. the maximum value accruable; and size, in terms of the magnitude of the value.

Episodic benefits generally accrue immediately but the effect is generally short-term and marginal, requiring the constant investment of fresh resources to renew the effect. Cached benefits are enduring assets offering long-term to permanent advantage. The effect occurs with a time delay and requires effort, commitment and active participation. Episodic benefits were realised through creating intermittent opportunities for a wide range of people to engage in an artistic experience. These were experienced through direct participation in the creative workshops and the short film productions, or indirectly as and when the creative output was ‘consumed’. The skills, expertise, networks and perspective developed by the trainees, employees and executives through the ongoing participation

represent lasting and 'storable' benefits. The enduring properties are likely to be transferable across levels and locations, as they can be utilised expediently.

The benefits accrued through what Austin and Seitanidi (2014) term as associational value, induced by publicity and press releases, temporarily boost the image of the organisations. Long-term relationships that penetrate deep into the structures of the collaborating organisations lead to cached benefits. The organisational learning experienced by IMS and Sony, as well as by IMS as an outcome of the experiences with managing the collaboration portfolio, demonstrate this effect (Seitanidi 2010). The cached macro level benefits in the form of the creative apprenticeships programme was an outcome of a long-term, progressively strategic approach to managing a collaboration portfolio. This contrasts with the episodic benefits created by IMS in the local communities when film shooting created a momentary 'buzz'.

P3: In the arts context, benefits occur in two forms: episodic benefits and cached benefits.

Episodic and cached benefits are conceptualised as distinct operands of the value potential. In order to understand the perceived worth of the value generated in terms of achieving societal betterment, it is necessary to understand the locations of value, i.e. where the benefits are generated (Seitanidi 2010), the levels of analysis (Selsky and Parker 2005; Austin and Seitanidi 2012b) and their financial function (Gourville and Rangan 2004). This includes the impact on organisational strategy, the wellbeing of the individual beneficiaries or societal betterment. Also important are insights into how and what type of value the distinct benefits induce through their perceived proximity of the actual impact, the lifespan of the advantage, the magnitude of the impact, as well as the capacity of the distinct benefits to conduct value capable of inducing societal betterment i.e. the time, durability, size and limit of the two categories of benefits.

Building on the four elements, the expedience of the episodic and cached benefits to deliver value for society, as observed in the case study, helps to determine their distinct functions. Episodic benefits are isolated, unrelated occurrences of immediate, yet ephemeral gratification. These are related to watching one of the short films or one-off participation in workshops without the pro-active attitude or opportunity to continue, an isolated financial contribution, or the feel-good factor of handing a charitable cheque to an

NPO. Emergent during or as a direct result of the benefit stimulating encounter, the longevity is restricted and requires continual renewal. Some benefits may persist for a period of time, such as the sense of satisfaction from contributing to social good for individual executives or employees; and/or the potential link to more lasting advantage of expanded personal networks as a result of socialising in the varied workshops and film productions for participants; as well as the improved image related to association with an organisation in a different sector on the meso level. However, more typically the episodic benefits are consumed during or shortly after the encounter (Brown 2006).

Examples of the episodic benefits observed in the case study include: employee entertainment, incentives, and corporate hospitality linked to the annual showcases; publicity as a result of specific events and one-off financial grants for IMS; isolated occurrences of increased sales for the business partners due to publicising of the relationship; the enjoyment of participating in the workshops and film productions; and pleasure derived from the final artistic output.

The trainees' involvement in the workshops and film productions were shared through joint participation (Brown 2006). Through social contagion, the temporary feeling of satisfaction is demonstrated as containing the capacity to trickle across to the participants' wider social groups, such as families, school related networks, etc. (Kolk et al. 2010). It results in temporary improvements in the sense of well-being in the wider community (Nelson and Zadek 2000), as can be observed in the case study: *"living in the valleys, things like this are not generally accessible to us... And what it does... is absolutely brilliant"*. Although the outcome is beneficial, the effect is ephemeral and requires continued renewal. The capacity to mediate any significant value for the collaborating organisations and the wider society is impeded as the benefits are either too highly intermittent to make an impact or are expended before their value can be fully utilised.

P3a: Benefits that produce instant, yet ephemeral and marginal advantage are episodic, and create transient value mode.

Episodic benefits lack the cumulative properties of the more enduring benefits. The value accrued is temporary, lacking enduring capacities, forming 'transient value'. Transient value is conceptualised here as a distinct collaborative value mode. Cached benefits

epitomise advantage beyond pleasure and enjoyment, and ‘cosmetic’ improvements (Ellson 2004). These contribute to a personal locus of control, organisational sustainability through performance, culture and strategy building, and societal sustainability through advancing the system. Cached benefits are storable by nature and so amount to a cumulative value that can be tapped as and when required.

Providing novel opportunities for personal development through building confidence and life skills is seen as a focal tactics of advancing social progress (Lefcourt 1982; Matarasso 1997; Şişmanyazıcı-Navaie 2004; see also Andreasen 2006). Effective NPO-business collaborations create value beyond direct benefits for the partnering organisations (Waddock 1988; Austin 2000; Seitanidi 2010; Austin and Seitanidi 2012a). Benefits generated for individuals mediate value creation on all levels of analysis (Bhattacharya et al. 2009; Vock et al. 2011). The case study demonstrates the collaborative ethos underpinning the operations ensured “the dynamic constellations of interactions” that guided the relationships (Seitanidi and Lindgreen 2010:1) and generated cached benefit for the individuals directly involved. These then helped to induce cached “meso” level benefits for the partnering organisations. The inherent transferability of value (Lepak et al. 2007) and consort of cached micro and meso level benefits stimulated the emergence of benefits external to the individuals and organisations directly involved in the collaborative action, giving rise to value creation at the macro level.

Improving the perceived locus of control is a crucial goal for individuals and groups without a vantage point of access to a preferred social standing. Lefcourt (1982: 33) defines personal locus of control as “a generalized expectancy for internal as opposed to external control of reinforcements”. The perceived control is directly linked with opportunity access. Disadvantaged groups commonly hold fatalistic, external control beliefs. Enabling people to acquire positive feelings with one’s achievements increases the likelihood of adopting internal control expectancies (Lefcourt 1982: 30). Providing personal development and skills through creative opportunities for young people who otherwise would have been unlikely to gain access to the arts, represents the principal cached micro level benefit of the collaborations. The numerous testimonials presented in the case study elucidate the positive impact and the magnitude of the effect of the micro level benefits. The residual positive effect of the original benefit within an individual’s social groups explicates value transferability between the locations of value creation (Kolk et al. 2010).

7.2.3.1 Value transfer micro-processes

Empowering people by affording them the advantage to take control of their lives applies more widely in society, beyond the issues of marginalised societal segments (Lefcourt 1982; Matarasso 1997). As the case study demonstrates, Kylie inadvertently became the first trainee at IMS. During the eight years she assisted Roger Burnell and helped to manage the scheme, she developed a spectrum of skills ranging from personal to professional and vocationally related. Utilising her degree and the close working relationships with the industry professionals at ITV Wales, Kylie was able to develop the necessary practical skills to become a producer on the summer short films, essentially side-stepping the more traditional career path in the media industry. Her developing personal locus of control is evidenced in the following comment:

“... When I’ve gone to meetings and being the youngest person there I’ve not felt confident enough to really say anything, in case people think: Um, she doesn’t have any idea what she’s talking about, because I hadn’t been in the industry for anywhere near as long as my peers. But having had all the hands-on experience I have now, I don’t think it really matters how long you’ve been working in the industry; it’s about what you’ve learnt so far, what skills or advice you may have to pass on to others, and the new perspective you can bring to a company or project...”

The magnitude of value that can be generated by creating cached benefits at the micro level is also shown here. Although the value for society is imparted indirectly through the benefits gained directly by the employee, in the long term, the benefits acquired are reciprocated through the individual’s ongoing engagement with the organisation and its associates. Kylie’s progression towards mentoring the trainees and apprentices, contributing to the development of the scheme’s strategy with the vision of succeeding as the leader, and helping to develop the apprenticeships scheme explicates directly how cumulative value created on the micro level trickles across to produce cached benefits on the micro, meso and macro levels. Similarly, the trainees that progressed into professional careers in the creative industries demonstrate how the individual engages in returning the advantage received. This can be either within or across the levels (Kolk et al. 2010), driven by the

norms of reciprocity in social relations. Succeeding as mentors for new trainees created comparable benefits on the micro level. It further contributed to the increased capacity and the quality of training, which then improved organisational performance at IMS.

Many former trainees developed successful acting and film producing careers. Their contributions to the development of flourishing arts and creative industries leads to further cached benefits on the macro level. Through the storable properties and inner capacity to accumulate, the cached benefits accrued by the trainees, employees and executives enable the cumulative value created on the micro level to be captured by beneficiaries others than those originally intended (Lepak et al. 2007). Individuals, organisations and wider society within the collaborative action, as well as external to it, benefit from this.

The growing reputation of IMS built through the various accolades and successful careers of the trainees, as well as the creative output and the CSR related enhancement to the partner businesses indicate value transfer from the micro level to the meso level. Beyond the social and economic value created internally, the successful career development of a number of trainees signal value for society in the form of employment creation and enrichment of the artistic and cultural heritage. This contributed to societal betterment by generating benefits for individuals and organisations in the external environment. When these antecedents become identified and captured by the relevant constituents in the external environment, the created benefits have the aptitude to generate improvements at the broader societal level (Seitanidi and Lindgreen 2010).

P3b: Cached benefits that accrue with a time delay but are enduring and formative are distinct from episodic benefits as operands of collaborative value; cached benefits produce cumulative value.

7.2.4 Classes of collaborative value

Perceived consort exists in pertinent literature that shows that value magnitude is commensurate with the degree of collaboration maturity (Austin 2000; Rondinelli and London 2003; Googins et al. 2007; Kourula and Halme 2008; Seitanidi 2010; Austin and Seitanidi 2012a). As demonstrated previously, progressing from reactive responses in

traditional transactional collaboration to pro-active engagement in transactional hybrids essentially modifies the quality of benefits from transitory to enduring (Austin and Seitanidi 2014). In the conceptualisation proffered here, the collaborative value transforms from largely transient to cumulative. Collaboration literature typically categorises the benefits as organisational and social/societal outcomes (Varadarajan and Menon 1988; Scheff and Kotler 1996; Nelson and Zadek 2000; Rondinelli and London 2003; Gourville and Rangan 2004; Moir and Taffler 2004; Seitanidi 2010). Seitanidi (2010) further posits that the progress from 'partnership approach' to 'social partnership' transforms social outcomes to societal.

The delimitation of collaborative cumulative value capable of contributing to societal betterment increases (Bowen et al. 2010; Austin and Seitanidi 2012a). Synergistic value creation that emerges in advanced approaches produces innovative solutions to systemic problems and this benefits constituents involved in the collaboration and beyond. By co-creating supporting structures in society, the cumulative value creation confined to the collaborative action essentially transcends to wider society and stimulates cumulative societal value. The improved societal conditions in turn provide benefits to the partners and individuals involved in creating the original value, enabling the emergence of the virtuous circle (Waddock and Graves 1997; Austin 2012 – conference discussion).

P4: Cumulative social value and cumulative societal value are distinct classes of value in arts and business collaboration.

The ultimate aim of cross-sector collaboration centres on creating value that contributes to societal betterment (Austin 2010). However, the claims that promise the delivery of social good often remain in the realm of rhetoric (Seitanidi and Lindgreen 2010). The absence of explicit focus on societal outcomes attracts decreasing public trust in social alliances as purveyors of social good capable of improving societal welfare (c.f. Kolk et al. 2010; Seitanidi 2010), increasing the urgency of the question of how is society better off due to collaboration between NPOs and business (Kolk et al. 2008; Austin 2010; Seitanidi and Lindgreen 2010; Austin and Seitanidi 2012a). Of 'primordial interest' is the magnitude of value generated for society and how it is achieved (Austin 2010).

Trickle effects (Kolk et al. 2010) and value transfer across different locations activated through the norms pertaining to social exchange, social identity, social contagion and social learning provide fertile ground for examining how societal value can be achieved (Brammer et al. 2007; Gond et al. 2010; Kolk et al. 2010; Vock et al. 2011). It is, however, necessary to distinguish whether the perceived societal value produced is in fact a direct result of the collaborative action, or it is an opportune outcome of the NPO's mission. Enabling the NPO to achieve its mission and/or helping it improve social outcomes via financial support is distinctively different from actively working together on enabling changes in society that can sustain the social outcomes and benefit a large number of people in society (Selsky and Parker 2005; Googins et al. 2007; Seitanidi 2010; Austin and Seitanidi 2012b).

The ITV Wales, Barclays and Sony employees enjoyed participating in the workshops, film productions and annual showcases. The sense of satisfaction from doing social good and making friends across sectors resulted in the development of constructive skills and expertise, a broadening of perspectives regarding the state of the creative industries, a widening of professional networks and a better understanding of organisations from different societal sectors. It generated benefits that can be 'stored' and 'retrieved' by the original beneficiary and by other constituents within the collaborative action capable of capturing the value transferability of the cumulative value.

The sense of gratitude following an opportunity to participate in an enjoyable and constructive activity, underscored by an enhancement of the employee's interpersonal skills and the learning of different styles of working, trickles across to the organisational level (Darso 2004; Kolk et al. 2010). It can lead to improved organisational performance and a lower turnover of staff related to the increase in employee motivation, satisfaction and commitment (Bhattacharya et al. 2009; Weinstein 2010). A similar transfer of benefits occurs for the NPO partner. The opportunity to work alongside industry experts enabled Roger and Kylie to internalise new skills and expertise that were subsequently implemented at IMS and led to improved organisational performance.

The strategic response to CCI at ITV Wales and at Barclays with the help of A&B carried the necessary propensity to guide IMS towards more advanced levels of collaboration. It enabled the business partners to partake directly in the creation of cumulative value on the micro level. It further allowed the partners to capture a degree of

the cumulative value on the organisational level. However, the potentially transforming societal value related to the co-creation of industry-wide unique, creative and financial training programmes was stymied as the partners failed to realise or opted to ignore the full potential. The lack of awareness of the value creating potential pre-empted an opportunity to prevent the abrupt dissolution and pre-designed short-term structure, respectively, resulting in a missed opportunity to induce systemic changes in the training structure within film and media education (Seitanidi and Crane 2009).

The 'missed opportunities' (Seitanidi and Crane 2009) inhibit the potential of the cumulative social value to be transferred to wider society. The value captured by the constituents in wider society, whether individual or organisational, lacks the enduring properties to induce societal betterment, and is merely an opportune outcome of the cached benefits accrued by the specific individual. Collaborative action produces a consort of episodic and cached benefits for individuals directly involved, but comes short of ensuring that supportive structures exist in wider society that can sustain the benefits accrued; this generates a collaborative cumulative social value. Cumulative social value is instrumental for value transfer within the micro level and between the micro and meso levels. However, the macro level value produced through employment and cultural enrichment cannot be considered a direct outcome of the collaborative action.

The alliance with Sony demonstrates how an improved capability to communicate the worth of the alliance (Berger et al. 2004) and a long-haul approach underscored by mutual commitment and shared vision (Austin 2000) can transform cumulative social value attained through "simply strengthening NPOs so their social mission can be accomplished more effectively" (Austin 2000: 111). It also creates cumulative societal value by partaking in "multi-organizational stakeholder relationships" (Googins et al. 2007: 88-90; c.f. Austin 2000: 107-110).

At the beginning of the relationship, Sony assumed the role of an investor in IMS. The omission to combine the unique capabilities inherent in the shared industry affiliation observed in the ITV Wales collaboration may be a result of the embryonic collaboration specific organisational learning at IMS. Sony's responsive approach to community engagement as a result of underdeveloped organisational learning about CCI further prevented identification of a fit from the outset (Zadek 2004). The basic approach to collaboration meant that Sony merely invested in IMS's mission. Episodic benefits across

levels and value locations, and cached benefits internal to the collaborative action was the maximum value produced.

However, though the ongoing interactions, the organisations continued to learn together about the most effective approach to their relationship (Austin 2000). Sony began to develop and ultimately adopted a proactive approach to CCI. The core capabilities at IMS became more pronounced and the executives developed a full awareness of the value-adding capacity. IMS progressed from a benefits receiver to an equal partner with an aptitude to impart socio-economic benefits attractive to business partners. This created effective conditions for both partners who identified platforms that afforded opportunities to mobilise and combine their unique capabilities to capture innovation that would otherwise have not arisen. Identifying the mutually beneficial project of the trainees gaining work experience at Sony enabled IMS to operate year-round and facilitated the emergence societal value. It enabled IMS to participate in re-establishing the creative apprenticeship policy and, therefore, co-create benefits capable of inducing sustainable cumulative value in society. Beyond the cumulative social value and cumulative organisational value, cached benefits on the macro level were generated. These provided the support structure for the social and organisational value to transform to a collaborative cumulative societal value.

P4a: Cumulative value that attempts to generate systemic solutions beneficial to a wide range of constituents within and outside the collaborative arrangements is societal rather than social. Cumulative social value is denoted by value generated inside the collaboration.

7.2.5 Principles of societal value creation through transactional collaboration

As the previous sections discuss, extant research presupposes a causal relationship between the ability of collaboration to induce systemic changes, and the structural and governance characteristics of individual relationships. The growing degree of integration between the organisations, both strategy and individuals, and power equality in the relationship purportedly advance the individual value contributors (McNicholas 2004; Googins et al. 2007; Kolk et al. 2010; Bowen et al. 2010; Preece 2010; Seitanidi 2010; Austin and Seitanidi 2014). Preece (2010: 58) reports a case where an integrative shift in the

relationship structure between a business and an art NPO results in “unexpected and highly satisfactory outcomes for both parties”. Beyond organisational outcomes, Seitanidi (2010) suggests that transforming societal collaborative value begins to emerge once the dyadic structural and governance parameters exhibit at least a social partnership. The intentionality and synergy between the organisations enables the co-creation of innovation that produces multiparty benefits beyond the collaborative action.

However, the case study evidences a complementary understanding of how societal value can emerge from transactional collaboration. The narrative traces the evolution of IMS and the growing value magnitude through a series of parallel and consecutive transactional relationships with diverse partners. The case study demonstrates considering a portfolio of relationships an NPO manages in pursuit of their mission can provide constructive insights into transforming societal value creation and this is consistent with Ryan and Fahy’s (2012) study. The narrative provides an insight into the micro-processes through which value emerges and cumulates by a community arts organisation managing a portfolio of transactional "concurrent and overlapping relationships" (Ryan and Fahy 2012: 1149). It further delineates the principles that condition both the emergence of value as well as the processes of co-creating societal value through a complex web of transactional relationships (Cornwell 2008; Ryan and Fahy 2012).

ITV Wales, Barclays and Sony shared IMS's vision to improve access and training in the creative industries. Co-creating the pioneering practical training programmes acted as a catalyst for innovative approaches to developing creative talent. However, the remaining firm-centric power relations in transactional hybrids subjugate the negotiating power of the NPOs in these relationships (Kim 2009; Knight 2010). It inhibits the ability of the NPOs to continue or progress a relationship in the direction of fully attaining its mission by generating societal value. The observed short-term visioning by Barclays and the perceived lack of interdependence through which ITV abruptly terminated the relationships prevented the emergence of societal value. Both are a result of the business negotiating dominance that prevented IMS from saving the relationships. The inability to extend the lifespan of the collaboration inhibited the transformation of the social value generated into societal value by extending the unique training to individuals in wider society. The case, therefore, concurs with Seitanidi (2010). Transactional dyads largely lack the necessary structural and governance drivers to generate societal value.

However, the findings suggest that arts NPOs can generate societal value by utilising a portfolio of transactional relationships in pursuit of their mission, similar to the proposition by Ryan and Fahy (2012) that examining relationship portfolios is likely to yield new insights into value creation in sponsorship. The creative apprenticeship re-establishment, the key transforming societal value generated by IMS links directly to the Sony collaboration. However, a number of key preceding and concurrent relationships enabled IMS to progress the Sony relationship to the highly integrated relationship structure. The parallel and consecutive relationships enabled the continual development of socio-economic benefits that cumulated to the societal value co-created with Sony. The early purely transactional relationships provided finances and in-kind support through which IMS expanded its initial capacity and helped spread awareness of the scheme. The subsequent hybrid relationships with ITV Wales and Barclays added greater expertise and provisions, and helped develop a professional reputation. Concurrently, one-off relationships with businesses provided additional funding, such as the different sponsors involved in the annual premiers. Although to varying degrees, the compounded effect of all the relationships contributed to the organisational learning that enabled IMS to induce the transforming change, similar to Chien et al.'s (2011) view that an aggregate effect of relationship outcomes can influence the worth of collaboration.

The micro-processes of generating societal value through a portfolio of transactional relationships were particularly evident in the events surrounding the termination of the ITV Wales collaboration. As was discussed previously, this collaboration produced social value in the form of internal cached benefits. It also entailed a prospective external value, thus generating societal value potential. The narrative shows that neither the co-created social value nor the societal value potential was fully eliminated following the sudden relationship dissolution. At this stage, IMS accumulated considerable experience with cross-sector collaboration that improved the understanding of its position as a value provider in collaboration. IMS had also developed a reputation as an enterprise that provides valuable opportunities to disaffected young people in South Wales. Although IMS was not able to save the ITV collaboration, the enhanced core competencies and expertise helped IMS to promptly establish a new relationship with BBC Wales to restore the innovation in film and media training. Likewise, fiscal stability was secured by the ability to negotiate a greater inter-organisational integration and support with Sony. The continued focus on their

mission with the help of the portfolio of relationships that were managed parallel to the ITV relationship and the ability to replace ITV safeguarded the cumulating social value without significant disturbance. Moreover, the cumulative value magnitude progressed towards transforming through a greater organisational fit and more engaged working relationships in the newly established collaborations (Austin 2000; Berger et al. 2006). The unique practical creative training developed by IMS and Sony became open to individuals external to both organisations through the creative apprenticeships.

The case study, therefore, supports the recent network theorising in sponsorship literature (Cornwell 2008; Chien et al. 2009; Ryan and Fahy 2012) and arts and business collaboration research (Bussell and Forbes 2003; Kim 2009). Specifically, understanding the contributions of collaboration to organisations requires considering the effect of the entire portfolio. The findings complement the view of Chien et al. (2011) that a portfolio has a compounded effect on a firm's image and reputation, by demonstrating its validity from an NPO's standpoint. Moreover, the case demonstrates that this theorising can be extended beyond the organisational level contributions. A portfolio of parallel and consecutive relationships developed by a community art NPO supplements the need for a single progressing dyadic relationship in generating societal value that can induce societal betterment.

P5: In the arts context, generating societal value is not dependent on a single dyadic relationship that evolves over time. Cumulative societal value can emerge through a portfolio of parallel and/or consecutive transactional relationships developed by an arts organisation over time.

Theme 2 indicates that not all transactional relationships carry the capacity to enable a portfolio to generate societal value. As argued by Kim (2009), each arts organisation needs to consider the ideal mix of relationships that will facilitate the aim of the collaborative strategy. Studies suggest that greater societal impact is achievable through more advanced arts and business relationships (McNicholas 2004; Kim 2009). The creative training innovations that were delivered in the more advanced transactional hybrids partially support this theorising. However, the findings indicate that some of the complexity that

supports societal value generation is substitutable through managing a portfolio of parallel and consecutive transactional relationships.

The case study further observes that the existence of organisational factors that contribute to societal value creation relies on the personal effort of a range of individuals. The ability to establish, complement and replace relationships in a portfolio to maximise its societal value creation effectiveness is shown to rest on the personal beliefs and convergence of the personal values of different individuals (Daellenbach et al. 2013). Consistent with organisation-centric academic thinking, this included individuals both at the executive level (Austin 2000; Harris and Crane 2002; Brammer and Millington 2005; Waddock 2008; Knight 2010) and throughout organisational hierarchies (Hemingway and MacLagan 2004; Hemingway 2005; Berger et al. 2006). In addition, as presented in Proposition 0, the individuals include target beneficiaries who must self-select and proactively engage for any value in a relational context to emerge. This suggests that the individual level factors need to be fully integrated into the understanding of how arts and business collaboration generates value for society, rather than being nested within the organisation-centric standpoint (Le Ber and Branzei 2010). Before discussing each level in more detail, this proposition suggests that understanding societal value creation through a transactional portfolio requires an examination of organisational and individual level conditions.

P6: The capability of an arts organisation to generate cumulative societal value through a portfolio of transactional relationships is principled by specific organisational and individual level conditions.

The organisation-centric perspective theorises that societal value rests on the assumption that the relationship is established and managed around achieving a specific social aim (Seitanidi 2010). Although practicable in integrative relationships where partners come together specifically with this purpose, the case study indicates a complementary view in transactional collaboration. Transactional collaboration typically centres on helping the NPO to attain its mission whether through generic resource exchange or more complex complementing of distinct resources (Austin 2000; Kim 2009). Kim (2009) considers relationship portfolios as a useful approach for arts organisations to develop a support

network through which the mission can best be achieved. Different types of relationships can be integrated into the portfolio, each offering a specific set of value creation drivers and contributors.

However, the findings here concur with Cornwell (2008) that integrating new relationships into a portfolio and adjusting to new partner requirements can be complex, even detrimental. The perceived departure from the initial focus on social inclusion at the end of the learning stage links with attempting to accommodate the demands of new professional creative training partners. Although such processes typify the growth stages of a majority of enterprises established with a social mission (Pirson 2011), this mission re-orientation threatened the cumulating societal value creation potential produced thus far. The existing portfolio, however, tempered the conflicting demands of the new partners. The social objectives imbued in the CCI agenda of ITV Wales and other business partners ensured that the professionalising efforts were integrated alongside the social mission. It ensured that IMS retained the original mission that safeguarded both the cumulative value and introduced scope for innovation.

Retaining the same social mission across the transactional relationships within the portfolio enabled the value generated through each parallel and consecutive relationship to cumulate in a complementary manner. The compounded value was then utilised in favourable collaborative circumstances to induce societal value through the creative apprenticeships. Portfolios of transactional relationships can, therefore, generate societal value, yet the process requires that the mission of the arts NPO remains unchanged and each relationship is utilised for advancing the existing social mission.

However, for the accumulated value to transform into societal value, favourable collaborative circumstances need to exist. On the organisational level, pertinent literature stresses the importance of incremental progression in collaboration development that aims at high societal impact (Austin 2000; Arya and Salk 2006; Porter and Kramer 2006; Googins et al. 2007; Austin and Seitanidi 2014). Each stage contributes to the development of mutual organisational trust and is conducive of organisational learning (Austin 2000; Zadek 2004; Googins et al. 2007; Bowen et al. 2010; Weinstein 2010; Austin and Seitanidi 2014). “An extended time horizon is implicit in serious commitment” (Austin 2000: 134). Besides transferring existing knowledge between the partners, Arya and Salk (2006) consider collaboration as conducive of new knowledge that the partners accrue from working

together. Although extant literature typically refers to the evolution of a single dyadic relationship, this case demonstrates that organisational learning can occur when a focal arts organisation manages a dynamic portfolio of relationships as long as the organisation retains its social mission focus across all relationships. IMS illustrates that the experience gained from managing a portfolio can produce organisational learning that transforms the understanding of the position in collaboration vis-à-vis the business partner from a benefits receiver to a benefits provider. This in turn enables the integration of more sophisticated value contributors within the relationships and these progresses the traditional transactional relationships to the more complex transactional hybrids.

As is evident in the case, the art sponsorship relationships in the early stages lacked the value contributors necessary to generate innovative solutions through co-creation. Although these resources contributed operational support, social value was an outcome of IMS's sole value creation efforts. During the Emerging phase, IMS was positioned as a benefits receiver due to a lack of collaborative experience. However, some characteristics can be supplemented through the complementary value adding capabilities of the different relationships in generating social and societal value in a transactional portfolio. Berger et al. (2004: 69) state that “fit and compatibility on [distinctive] dimensions can favourably affect a number of predictable problems”. Shared value creation (Porter and Kramer 2011) functions through organisations identifying constructive intersections between their remits.

The case study observations indicate that more advanced relationships can be established by isolating such nodes. The strategic response to CCI at ITV produced such progress despite the collaborative immaturity at IMS. ITV identified a product/cause fit that enabled them to partake in the creation of social value directly related to the mission of IMS (Berger et al. 2004). It directed the pooling of complementary core competencies that produced the innovative practical film and media training project (Austin 2000). However, due to the underdeveloped organisational learning regarding its value creating aptitude in collaboration, IMS was unable to prevent the abrupt, premature dissolution of the relationship.

Similar issues arose in the Barclays and Hugh James relationships. Both collaborations generated highly constructive social benefits through co-creating financial and business training courses tailored to the mission of IMS. For example, IMS's expertise in youth engagement aligned with Barclays' community engagement objectives to extend

financial education to marginalised young people. However, the low levels of collaboration specific organisational learning during the Emerging phase prevented IMS from assuming an equal position within the relationships. The short lifespan of these relationships can be attributed to the lack of experience at IMS to persuade and demonstrate how continual engagement can transform the co-created social value into societal value with long-term, positive effects across multiple levels. Although highly effective social value was generated across these relationships, progress towards societal value co-creation failed to materialise.

However, the case study demonstrates that when portfolios are considered, societal value can still emerge. The compounded collaborative experience gained through the different relationships within the evolving portfolio cumulated in the Professionalising phase. This maturing organisational learning enabled IMS to progress the Sony collaboration towards a transactional hybrid. The initial basic transactional relationship assumed due to a lack of collaborating experience of both partners progressively advanced through both mutual, and independent learning. The favourable organisational conditions enabled the co-creation of a programme that facilitated a significant change in the creative education policy in Wales.

Innovation in collaboration that generates societal value emerges from synergistic value which increases with the degree of progression along the CC (Austin and Seitanidi 2014). The early art sponsorships "lacked the combination of the collaborators' distinctive assets" (Austin and Seitanidi 2012: 731) necessary for synergistic value to lead to unique innovation. The transactional hybrids illustrated by the ITV, Barclays, Hugh James and Sony collaborations, although to varying degrees, combined the necessary value contributors through which unique creative training emerged. The complementary unique innovations these relationships produced demonstrate the potential for "systemic transformation and advancement at [all levels]" (Austin and Seitanidi 2014). This shows that transactional portfolios can generate transforming societal value so long as transactional hybrids are integrated within the portfolio. The organisational factors that condition societal value creation through transactional portfolios are summarised in proposition 6a as outlined below.

P6a: On the organisational level, societal value creation in transactional portfolios is moderated by: i) the mission of the focal arts organisation remains unchanged and the

purpose of the collaboration in every relationships centres on attaining the mission, ii) organisational learning at the focal arts organisation supports the integration of transactional hybrids in the portfolio; iii) transactional hybrids form part of the portfolio as they facilitate societal value generation through innovation.

The personal influence of individuals in a position of power has been long recognised as influencing corporate support programmes (Young and Burlingame 1996; Leclair and Gordon 2000; O'Hagan and Harvey 2000; Brammer and Millington 2005; Daellenbach et al. 2013). Literature, however, reports a distinct move from personal discretion in CCI towards strategic intent (Saiia et al. 2003; Seitanidi and Ryan 2007). Moir and Taffler (2004) specifically exclude managerial utility in corporate support in their framework of corporate arts supports motivations, arguing that individual personal preferences are not part of corporate motivations. However, the evidence in the case study contradicts these views. All the major relationships within the portfolio IMS had since its inception, including ITV Wales, Sony and BBC Wales, indicate the commitment of senior executives to the social mission as a crucial element.

The shared personal values regarding the beneficial role of creativity in society and the need to eradicate any barriers acted as conduits to the establishment of the relationships and safeguarded their relative longevity. In particular, Steve Dalton's commitment through his role as an avid personal supporter of IMS was palpable in the interlocutions with the IMS executives: *"I think it's just a genuine desire on the part of the MD..."* This indicates that personally motivated change agents using personal influence and power "determine which initiatives would be most promising in the context of the particular company" (Cramer et al. 2004: 218). Rather than focusing solely on the structural and strategic aspects of collaboration in understanding value creation, the case study concurs with views that personal preferences remain an active element in collaborative value creation in the arts context (Le Clair and Gordon 2000; O'Hagan and Harvey 2000). The personal preference of a senior executive to a social cause is a pre-requisite for the issue to become adopted (Austin 2000; Frank and Geppert 2004; Knight 2010; Daellenbach et al. 2013).

Hemingway (2005: 238) concurs that personal preference is vital but she states that "socially responsible acts are not confined to management". Similarly, Daellenbach et al.

(2013) state that it is not individuals' official ranking that influences decision making in arts sponsorship but rather 'expert power' and knowledge. Consistent with current academic thinking, personal values and good relations amongst senior executives observed in the case study were an instrumental factor in introducing the concept of collaboration (Austin 2000; Brammer and Millington 2005) and in selecting the arts as a specific social setting for collaboration (Frank and Geppert 2004; Knight 2010). However, middle managers' and employees' identification and sense of ownership emerged as being crucial for the day-to-day enactment of the relationships. This is consistent with Daellenbach et al. (2013) who report that the influencing individual is often a lower-ranking manager. "The organizations, not just the leaders, must own the alliance" (Austin 2000: 124). Engaging employees from across the organisations in the relationships, such as those observed in the relationships with ITV Wales, Barclays and Sony, denotes the *modus operandi* of successful integration as it helps permeate the concept within the organisations (e.g. Hemingway 2005; Berger et al. 2006). As a greater number of people take ownership of the relationship and become committed to attaining the social mission, the value contributors of the relationship progress and increase the value creating potential of the collaboration (Austin and Seitanidi 2014).

However, studies further report establishing relationships purely on personal relations is myopic as issues such as resource constraints factor significantly in the ability to continue a relationship (Brammer and Millington 2005; Sasse and Trahan 2007; Knight 2010). An unexpected ending to a dyadic relationship poses a threat to the cumulative social value creation and to societal value creation potential (Halinen and Tähtinen 2002; Ryan and Blois 2010). However, the findings here suggest that personal values and personal relationships can prevent the depletion of the societal value potential in transactional relationships where a portfolio of relationships exists. The ITV collaboration was distinct by the intense emotional links between the counterparts across different levels within the organisations. These relationships contributed to generating significant social value, similar to the "mutually reinforcing, engaging, passionate, validated attachments" in social alliances identified by Berger et al. (2004).

However, despite the advanced nature of the 'engagement driver' contributors that arguably safeguard relational longevity (Seitanidi and Crane 2009; Austin and Seitanidi 2014), the collaboration ended abruptly due to resource constraints experienced at ITV

(Sasse and Trahan 2007). Indeed, Halinen and Tähtinen (2002) suggest that sustaining factors that help cultivate the societal value potential, such as the personal relationships observed in the ITV collaboration, are eradicated as collaborative relationships dissolve. However, the case study demonstrates that this is not always the case. Some relational bonds developed in the ITV collaboration survived beyond the formal relationship ending and acted as a protective mechanism for the social value cumulating at IMS and the societal value creation potential. The crossing over of Elis Owen from ITV to BBC Wales at the end of the Enterprising stage and the immediate resumption of his role as the scheme's champion safeguarded IMS from collapse.

Likewise, the increased dedication of Lisa Edwards to the scheme as a mentor and taking on further responsibilities following the disengagement contributed to the ability of IMS to continue pursuing its mission. The personal values of these two individuals helped restore the cumulative value at IMS. The findings suggest that relationships developed from shared beliefs have the capacity to transgress organisational affiliations, similar to the views of Ryan and Blois (2010: 613-614) that "because people are not robots... as social and resource bonds build up over time, the relationships will... no longer [be] made up of anonymous atomistic actors in the market but rather a rich tapestry of interconnected and interdependent agents... where one can call upon the other to help in times of crisis or urgency." Despite the considerable difficulties that relationship ending presents for NPOs, personal beliefs and mature personal relationships between the "boundary spanning agents" (Ryan and Blois 2010: 614) can safeguard the societal value potential that can be built on subsequently by utilising the portfolio.

Elis Owen's actions to establish the BBC Wales collaboration secured the creative mission following the ITV collaboration ending. However, the fiscal instability that emerged at IMS posed a serious threat to its future and, therefore, to the societal value potential. As the case demonstrates, personal relations again contributed to safeguarding the cumulating societal value potential at IMS. Roger Burnell utilised the personal relationship with Steve Dalton at Sony to secure core funding. The new deal between the organisations saw a significant deepening of the collaboration in many respects. Primarily, the collaboration now extended throughout the organisations. The appointment of specific individuals to manage the relationship helped the collaboration to penetrate deep into the organisations (Seitanidi and Crane 2009).

The mutual assistance with projects introduced different levels of employees from across the organisations and enabled further personal relationships to develop. Consistent with Austin (2010: 14), the multilevel interpersonal relationships facilitated the successful implementation of the relationship at Sony as it improved "trust, quality of communication, and degree of effort". Although the establishment of this relationship rested on the leaders' personal preferences and relationship, the longevity of the relationship and the magnitude of value generated was secured through the multilevel personal relationships as described by Roger Burnell:

"In all honesty, it probably is conversations that I'd have, one to one, with [Steve Dalton], who I've got a personal relationship with. But then, that gets disseminated so, he'll ask his second in command to come to talk to Kylie and then, they'll discuss when funding, funds can be released, and so on."

This experience is consistent with Arya and Salk (2006: 224): "... converting private (individual) social capital to public (organizational) social capital by involvement of line managers in socially responsible decisions can promote institutionalization of [a relationship]." The partaking in the re-establishment of the creative apprenticeships in Wales rested on a wide range of individuals throughout both organisations extending their support. Individuals from senior executives to factory operators proactively worked together to enact the unique training programme; and external audiences appreciated and enjoyed the efforts.

The societal value generated during this stage of IMS evolution was however built through processes beyond the Sony collaboration. It was facilitated through the diverse set of prior and concurrent relationships through which IMS learnt and progressed. The case demonstrates that human factors in the form of a personal appreciation of the arts for human aptitude development and the relationships resultant from shared beliefs in the arts for development are a significant antecedent to social value creation. This is produced through a portfolio of transactional relationships managed by a community arts organisation. Moreover, it facilitates a network through which the generated value continues to cumulate until conditions conducive to transforming societal value creation potential to the creation of societal value emerge.

Consistent with extant collaboration literature (Harris and Crane 2002; Hemingway and MacLagan 2004; Hemingway 2005; Waddock 2008; Daellenbach et al. 2013), individuals as employees of the collaborating organisations are found to represent a significant factor that conditions social and societal value creation through transactional portfolios. The findings of Hemingway (2005) and Daellenbach et al. (2013) that these social cause agents operate across organisational hierarchies are also supported. However, besides the traditional organisation-centric view of the role of the individuals, the case concurs with Bhattacharya et al. (2009) and Le Ber and Branzei (2010a) that a beneficiary standpoint needs to be integrated to gain a holistic picture of collaborative value creation for society.

As discussed in Proposition 0, value creation in the arts context follows the relational perspective. Value creation is contingent on the beneficiary's active involvement in its production. Since the trainees in this context are considered as internal constituents of the collaborative action, the class of value is social. Societal value only emerged once individuals external to IMS and its portfolio of partners were able to engage in the creative apprenticeships. The social value IMS, its trainees and collaboration portfolio co-created matched the personal values and requirements of the external stakeholders. This transformed the cumulated societal value potential into generating societal value. Human factor is here identified as an antecedent of the ability of transactional collaboration to generate societal value.

P6b: On the individual level, multilevel individuals share in the socially oriented artistic mission that underpins the collaboration and are committed to its attainment as follows: i) executives facilitate and support the existence of such collaboration; ii) employees' commitment is secured; iii) internal and external beneficiaries self-select and participate proactively.

7.2.6 Functions of the business partner

Extant literature distinguishes between a number of levels of integration of collaboration to business strategy (Austin 2000; McNicholas 2004; Porter and Kramer 2006, 2011; Googins et al. 2007; Kim 2009; Weinstein 2010). For example, McNicholas (2004)

reports four different approaches to arts sponsorship based on the degree of strategic matching and longevity of commitment. This is consistent with the case study findings that show a variety of business support ranging from the ad-hoc support of the showcase sponsors to the long-term relationship with Sony. Studies further concur on the increased magnitude of value for society related to the progressive stages (Austin 2000; Austin and Seitanidi 2014). As the business partner begins to directly engage with the NPO, the value generated progresses from social to societal (Seitanidi 2010). The target beneficiaries and NPOs are required to adopt a pro-active attitude to attaining the mission of the community arts organisation, and so are the business partners.

The case shows that in the initial stages of evolution at IMS, the business partners 'reacted' to the financial and in-kind requests as no opportunities for more advanced collaboration were proffered. Although social benefits emerged, the expediency of the transient value and lack of innovation precluded societal value creation. It was ITV's prior experience of working with socially oriented entities that initiated the advanced collaborative approach. ITV assumed the role of a benefits producer, having identified an appropriate fit through which unique resources were combined and produced an innovative solution to overcoming barriers existent in the creative industries. The relationship with Sony demonstrates uniquely the duality and the determinants of the role of value producer or co-creator of value. The initially basic transactional relationship saw Sony in the role of an investor in IMS's social mission. Beyond the inherent organisational benefits for both partners, Sony facilitated cumulative social value. As the relationship transformed into a highly integrated relationship, both partners became capable of pooling their respective expertise and resources to co-create innovative training programme within the creative industries that helped to induce a policy change in creative training in Wales. Beyond the systemic change in the education policy, the subsequent successful relationships with third parties may be seen as a further positive societal outcome on the macro level from this mutual organisational learning (Seitanidi 2010; Austin and Seitanidi 2012b).

Proposition 7: In the community arts context, the role of the business partner as a benefits provider (co-creator) in transactional collaboration is distinct from the role of a benefits facilitator in generating cumulative societal value.

Progressing along the collaboration continuum requires both partners to deploy distinct competencies, resources and expertise. They must determine the most effective way of combining them to co-create novel solutions to the social issue the NPO epitomises (Austin and Seitanidi 2014). The business partner retains the benefits facilitator remit; however, the conditions in the relationship enable the business to directly partake in projects built around societal betterment with the NPO.

The observed benefits facilitated by the business partners through association, and financial and in-kind assistance to IMS, produced social and organisational value. IMS utilised these generic resources for organisational development and the pursuit of its social mission. A multitude of episodic benefits across different levels, and cached benefits for the target beneficiaries began to emerge. However, as was discussed previously, the lack of supportive structures in wider society to nurture the created social value and open it up to external constituents resulted in the stalling of the cumulative value on the macro level. Combined with little opportunity for innovation, the likelihood of inducing societal betterment is minimal.

Beyond the organisational and social benefits produced within the collaboration, transforming into a benefits provider increased the potential for societal value to emerge. For example, societal value creation potential was observed by ITV co-creating the unique training structure with IMS that enabled many trainees to build successful professional careers. Similarly, ITV Wales and Barclays employees training IMS trainees and staff in vocational skills and financial management resulted in a number of new business set ups and freelance careers launched and ITV Wales created a job opportunity for Rebecca Davies. Societal value was directly generated where Sony participated in transforming IMS into a year-round scheme by offering real-life creative training opportunities for trainees at their corporate events, leading to IMS becoming a central organisation in inducing policy change in Wales.

7a: A business partner that participates in the value generating activity directly and proactively acts as a benefits provider (co-creator). Arm's length, reactive approaches typify benefits facilitators.

and

P7b: Organisational learning mediates the role of the business partner in creating cumulative societal value.

7.3 Summary

This part of the thesis presented a conceptualisation of the case study presented in chapter 6. It outlined a number of grounded observations and discussed them in light of pertinent NPO-business collaboration literature. The analysis examined the contribution of the case study to understanding how transactional collaboration generates value for society.

The chapter introduced propositions categorised in five themes in relation to creating value for society through transactional collaboration in an arts context. Two key principles form the basis through which value in relational contexts emerges: end beneficiaries are co-creators of collaborative value, thus value generated at this level is internal to collaborative action; and the distinct approaches to transactional collaboration, traditional and hybrid, vary in value magnitude potential. Collaborative value occurs in two distinct modes: transient value and cumulative value. Cumulative value entails greater value magnitude. Transactional collaborations generate two classes of value: cumulative social value and cumulative societal value. The latter can contribute to societal betterment. A number of factors on organisational and individual levels that condition the creation of cumulative societal value through transactional relationships were also discussed. Finally, the distinction between how the business partner functions in the process of value creation and the implications on value for society were delineated. The business partner either functions as a benefits facilitator employing an arm's length attitude to generating value, or directly co-creates societal value.

Having set out the initial propositions (see table 11), the next chapter will corroborate the propositions through a set of in-depth interviews. The interviews are augmented by relevant document analyses where applicable. The aim is to enrich and clarify the principles of collaborative value creation in transactional collaboration and the micro-processes between the operands and value creation, as well as the factors that condition societal value creation.

CHAPTER 8: CORROBORATION

8.1 Introduction

This chapter presents a separate study to corroborate the conceptual framework developed in chapter 7. It uses a set of cross-sectional qualitative semi-structured interviews to examine the perceptions of the target beneficiaries of the arts organisations (participants), employees of the collaborating organisations, business executives and senior managers; arts executives and senior managers, and a consultancy organisation. Rather than simply validating the conceptualisation presented in the previous chapter, the analysis and discussion aim to clarify meaning and to extend understanding of how arts and business transactional collaboration create value for society as perceived by each stakeholder group. Accordingly, the groups are analysed and discussed separately and the specific perspectives are then grouped under four themes identified in chapter 7. The chapter closes with a review and, where apposite, a substantiation of the propositions derived in chapter 7 as a result of the interviews.

8.2 Interview findings

8.2.1 Perceptions about the target beneficiary role

The interviews with the participants of the arts organisations indicate that the participants consider themselves as the principal beneficiaries. Accordingly, they considered themselves the key element behind the existence of the arts organisation:

“...the participants are the focus. In fact that would be the point of it. The aim of the organisations from the beginning is to provide something for the participants.” (O)

Volition and a proactive attitude to participation was considered vital for capturing benefits: *“... You got to volunteer yourself into them...” (RL)* and *“... in a way art is sometimes viewed an optional thing, a choice...” (LR)*. ‘Self-selection’ and an active engagement in the artistic

value creation process emerged as antecedent elements of the value that arts bestow to society.

In a similar vein, the artists saw the participant as the principal direct end beneficiary group. More broadly though, the artists considered themselves as well as the employees of the arts organisations as having a stake, as described by one of the artists:

“... the people that are actually involved... and the artists, I’ve got work from [arts organisation], from people who got to know me from working at [A1]... and I guess the people who run [A1] get jobs out of it...” (ML)

They nevertheless felt that the main benefit from collaboration is the help the arts organisations gain to improve their provisions for the participants and so fulfil their mission. In contrast, the findings in the employees’ interviews revealed a palpable conflict between who is regarded as an end beneficiary. Although the people who use the arts centres were identified as beneficiaries, the employees categorised themselves as forming the principal beneficiaries of the collaborative action. The individual level benefits were discussed as primarily benefiting themselves. One of the respondents stated that the employees are the sole beneficiaries. The difference can be related to the perceived source of the benefits. When talking about benefits directly provided by the relationship their employer had, the responses converged on primarily discussing their own personal benefits or the benefits accrued by colleagues. Benefits for the wider public and the participants were associated with the mission of the arts organisation or the arts as a positive social phenomenon, rather than a direct outcome of the collaborative action:

“... It enables [arts organisation] to carry on and do stuff for anybody else but I think that sort of benefit of the relationship is all for us...” (GS)

Most employees viewed self-selection as the underpinning factor in the ability to capture benefits, regardless of the basis of the benefit: *“it benefits people who wanna get involved...” (VS).*

The conflict observed in the employees' perceptions was mirrored in the business managers' perceptions about the direct end beneficiaries. Employees and/or other internal business stakeholders were considered the end beneficiaries in instances where the main aim was business oriented:

"... employees, they are the beneficiary of it... Another important element would be prospective employees..." (B2d)

Where social aim formed part of the objectives, the managers perceived the participants in the projects as the principal audience of the collaborative action:

"...The key beneficiaries are obviously the people that get to experience what's at the end, whatever [A3] is producing. There are other beneficiaries as well... but those people are the beginning the end of it all..." (B3a)

The willingness of these people to join in and continue to engage was deemed as foundational to value creation in collaboration.

Correspondingly, the phenomenon of end beneficiaries in the interviews with the arts managers was discussed as affected by the duality reflected in the business partners' approach to collaboration:

"...if the sponsorship deal enables the arts organisation to deliver a certain project, then the real beneficiaries could be the kids in the youth circus who now get the opportunity to do this thing. It might be the staff of the business... [B2], the primary ones are their staff. It depends entirely on what the project is..." (A4)

When discussing the end beneficiaries of the relationships, where the key objective of the business partner centred on gaining tangible and intangible benefits for the employees, the employees formed the primary end beneficiaries of collaboration. In relationships where social benefits formed an outcome of a co-creation process, the managers considered the participants or audiences as the primary beneficiaries. The interviewees considered participants' active participation as the core principle of all collaborative value:

“... And for those schoolchildren, right from that end of the scale...They are taking the opportunity to experience the arts. It’s breaking down the barrier of coming into the building like this and not thinking: it’s not for me, it’s not for my family...” (A3b)

Self-selection on the side of participants and employees was deemed as constitutive of creating collaborative value.

8.2.2 Summary of perceptions about the target beneficiary role

The findings show that overall the attendees of the arts organisation are the end beneficiary group. They are fundamental to the existence of the arts organisation. Since business partners engage in transactional collaboration on the back of the social mission of the arts organisation, the attendees are at the centre of collaborative value creation. In tactical collaboration, employees denote target beneficiaries as the business partner is motivated by organisational benefits. However, even then the target beneficiary of the arts organisation acts as an antecedent to collaborative value creation. Collaborative value creation in the arts context emerges from the initial artistic value that requires a co-creation response from the art organisation’s target beneficiary in the process of producing artistic value (Boorsma 2006).

8.2.3 Perceptions about approaches to collaboration

In the interviews with participants, distinct approaches to collaboration were discussed. The differences between what different terms used by the arts organisations actually entail were raised and debated:

“... sponsor just gives money and that’s it. But collaboration to me implies two way traffic which is good because then, the arts can then influence business, you know.”(O)

It was agreed that notwithstanding the terminology, the relationships need to be long-term and matched strategically to produce any kind of value and also to prevent potential scepticism:

“... They’ve gotta complement each other... otherwise it just doesn’t work for either end of the partnership. If it’s the right kind of partnership... a sustainable relationship, then I think it’s more favourable than perhaps when it’s being done in a very cynical way, because the business behaved badly...” (CR)

The participants were aware that the more sophisticated relationships tended to incorporate employee engagement. This was perceived as a more desirable form of collaboration for both organisations as they can tap the skills and expertise of their partners. Moreover, it can lead to cross-pollination of ideas and worldviews which is beneficial for both organisations and wider society.

The different approaches to collaboration were also raised by an employee who engages in a skills exchange programme:

“... sponsorship is a big part of our CSR, we’d much rather work with specific charities in a sort of a collaborative way. So we don’t sponsor, like our competitors, they sponsor [sports team], you know, we don’t, we don’t go for that. You know, it’s much more grass roots and local.” (PR)

Overall however, the employees discussed the differences in collaboration in light of the unique benefits organisations gained from employee engagement programmes. There was a perceived divide between the employees who benefited purely from tangible provisions such as ticket allocation, as opposed to those employees who took an active role in the partner organisation. The passive receivers of benefits largely saw their employer as the investor in the partner organisation rather than as actively creating social value. Although supporting the arts organisations was perceived by these employees as beneficial, one employee pointed out that the associational benefits that result from only providing financial support are not exclusive to the particular collaboration. They are easily copied and, therefore, may not be as valuable:

“... Yes, when a company gives money to community, people then appreciate the company rather than have negative things to say about it. But any company that helps always gets good faith from people so I’m not sure how much it helps.” (JC)

The employees whose involvement was more complex explained the relationships as mutually rewarding: *“... When it works well, all three benefit...”* (PR). More sophisticated exchanges resulted in skills, knowledge and expertise sharing, as well as broadened perspectives regarding industry specific processes. The benefits were discussed as a unique advantage for the organisations especially in relation to benefits for the arts organisations and the more sustainable benefits related to income were attributed to employee engagement:

“... certainly it helps with me being involved with [A6]. They get ongoing funding from us... because I keep working with them, you know, it’s like, can we give a bit more money...” (MP)

The employees concurred that the business partner is the investor in the relationships. It is the arts organisations that need money from their business partners to survive or to provide better provisions. This affords the business an advantageous position and provides it with a greater degree of power in arts and business collaboration.

The employees’ perceptions were largely consistent with the artists’ views of the approaches to collaboration. However, the artists tended to discuss the approaches in terms of what motivates the organisations to collaborate. Arts and business collaboration was perceived as driven by self-interest. Arts organisations engage with business primarily to obtain funding and in kind support. This enables them to fulfil their mission and access opportunities they might otherwise not be able to get. Accordingly, business was seen purely as an investor in the arts organisations, underpinned by a vested interest: *“... their main aim is making money and manipulating us really, a lot of the time... I’m a bit cynical...”* (LS). The artists deliberated that collaboration would be significantly more effective through finding opportunities where the partners could be more involved with each other through *“a symbiotic relationship”* (LE).

The business managers considered the relationships with the arts organisations as part of their CSR initiatives aimed at improving some form of stakeholder relations to include their staff, the local community, government and other organisations in their locality. A definitive move towards aligning the collaborations with business objectives and approaching the relationships strategically was evident:

“... there’s no reason why you can’t work with [HR], they’re looking to recruit... how to get recruits at a cheaper cost, you can do it through sponsorship...” (B2b)

There was a strong agreement for reciprocity amongst the respondents in that collaboration needs to produce benefits for business. The managers clearly indicated that businesses were moving towards relationships that enabled employee engagement. Employee engagement was discussed as the principle rationale in strategising the collaboration approach. It has become viewed as a highly effective tactic in achieving strategic benefits for business:

“... Times have changed dramatically...there is a business rationale behind it now and a lot is driven by the economic climate... we’re still able to provide support, it’s just using the direction with the employees, it’s really beneficial...” (B4)

Despite the overt focus on business objectives, the managers viewed the relationships as mutually beneficial. Particularly in instances where programmes engaged employees, the collaboration was perceived as generating bilateral benefits. The micro level employee benefits, especially cached benefits, were seen as trickling across to the meso level both in terms of the business and the arts partner:

“... So, it’s like an exchange of skills, they have creative skills and help out with that kind of thing... we may loan them an expert to help them with something that they’ve got...” (B1a)

The most effective arts partner benefits were attributed to the practical engagement of business employees. Access to business expertise and the subsequent skills transfer, as

well as the opportunity to introduce the workforce for audience/participants and volunteers development and for awareness building were considered highly effective for sustainable organisational development. The degree of impact between purely providing funding and a more advanced form of collaboration that enables engaging employees was raised by a senior manager:

“... we put funding in, but if I can get employees engaged in supporting that community organization, it adds value to our donation... I’ve had people from here go to sort out an IT system for a community partner. That saved that community partner hundreds of pounds...” (B3a)

However, two distinct categories of how the business partners approached the role in creating social benefits through collaboration transpired. Some business managers saw collaboration primarily as an investment opportunity to gain business benefit. Social benefits, in the form of an arts organisation’s ability to better fulfil its mission, were desirable but not principally motivating:

“... the artists and things, it’s definitely nice to have... that we can hopefully support that, it’s great. But it wouldn’t be a focus of ours...” (B2d)

In contrast, some respondents considered the social impact as part of the objectives behind collaboration. These businesses invested in the work of the arts organisation through which social benefits emerged much like the prior category. However, their portfolio also featured projects where they actively engaged in creating unique social benefits as an outcome of pooling distinct resources:

“... to increase the financial capability of the young people, that’s our overall aim in community programmes... We want young people to be able to go out in the big wide world and be able to manage the money they have...” (B5)

The interviews, therefore, point to two distinct approaches to transactional collaboration that inevitably mediate the magnitude and class of value generated for

society. In both approaches, managers utilised the relationships as a stakeholder relations tool, ultimately aimed at improving the performance of the business. In the transactional hybrids however, the meso level benefits emerge from engaging in co-creating socially oriented projects. The collaboration moves towards synergistic value creation (Austin and Seitanidi 2014).

The perceptions of the arts managers coincided with the business managers' findings. Arts managers with a long track record of managing business relationships acknowledged a definitive shift from traditional philanthropic and transactional approaches, towards an emphasis on aligning community engagement with business objectives:

"... branding, number one and number two to do with corporate hospitality, those were the key drivers 20 years ago. Now... there's awareness that alignment of values is good for them, in terms of their brand... that the arts and cultural organisations very often possess a degree of creative thinking and problem solving that is maybe absent from business, and maybe they can learn from us..." (A4)

Although the respondents pondered over the desirability of altruistic support, there was a strong consort that the business motivation is largely driven by self-gain: *".... It's not any great desire to support the arts, although it is, erm, portrayed that way..." (A2a).*

Accordingly, a strong emphasis on stakeholder management was noted. Nevertheless, the managers found no issue with the commercial orientation, providing the business partners are not deceitful about their motivations. The advantageous position in the relationships afforded by the demand and supply imbalance should not lead to exerting power by overbearing the arts partners with unwarranted demands.

Although unobjectionable, an over-reliance on arm's length sponsorship was perceived as exposing arts organisations to vulnerability due to the lack of substantial links between the organisations. Mutually beneficial relationships were seen as the underpinning principle of successful collaboration:

"... It doesn't tend to be sustainable anyway if they don't have the passion. It tends to fizzle out. Because, we're not working with a lot of money anyway so you have to

have a passion for it really, not just be in it for the money or the glory. It always has to be mutually beneficial, even if only through facilitating things...” (A1b)

Bilateral relationships guarantee sustainable development for all parties involved that can lead to the development of a thriving local economy, fundamental for the effective functioning of any organisation. The senior managers in particular discerned two distinct categories of business partners. Businesses purely interested in self-gain that assume the role of an investor in the arts partner, and companies that incorporate the well-being of the arts organisations as well as the target beneficiaries as part of the overall value creation process. Both were regarded as beneficial to fulfilling the mission of the arts organisations or making it more substantial:

“... It’s like a big cake, and the sponsors are, if not the icing, they’re the cherry. So we’d be cherry-less. So, everything I think would still go on, you just wouldn’t have that kind of, depth or gloss or the sexy cherry. It wouldn’t have the flavour that sponsorship can give...” (A2b)

The distinct approaches were discussed by the arts managers as to what their organisations can offer. As one arts manager remarked, some partners simply expect to be impressed by what the arts can offer. Others work proactively to develop relationships that generate multilevel benefits. A respondent whose organisation relies on a portfolio of business relationships elaborated on the difference:

“... [B3] is a good example of a company who have... said right, we want to get these things, let’s identify the places where we want to do it. And it’s been a much more two ways partnership, than [B2]. I’d say they are a classic example of people sitting there and saying, well impress us then...” (A3a)

Although the mutual approach was preferred, the managers considered any collaboration that involves access to the business partner’s employees or support that incorporates employee engagement as more valuable. Employee engagement affords opportunities to develop relationships that lead to increased audiences/participants and/or

volunteers. Gaining this type of benefits was perceived as improving the organisational stability. In return, the business partners gain incentives and practical staff engagement opportunities. Beyond entertainment, they can lead to skills and expertise development. The relationships where business employees were engaged resulted in mutual long-term benefits, and also generated benefits to wider society:

“... in terms of the mutuality of it all... we did workshops for their staff... it was good for us because of money... They took away [artwork] and had fun... it was us passing work to local artists so it was a part of the wider economy... less so when you’ve got [business partner]sponsoring and they just wanted to talk about where their banner went... they gave us £15k but it cost £20k to do what they wanted in terms of branding...” (A3a)

Such reciprocal relationships were deemed superior as they generated a greater magnitude of multilevel benefits. The arts managers felt that these relationships afforded them a degree of voice in the relationship:

“This [B2] has been like a more long-term growing relationship. It’s taught me, it brought me other ideas of how to approach other companies... Because they’ve come to us with a need... it’s like a really good relationship... I don’t feel I need to be very guarded with [business manager counterpart]. We can be quite honest in what we want to get. Whereas, a lot of the time with sponsors we have one of projects with, in and out, you’re really tiptoeing around and not really knowing what they want... and it’s all sort of really quite difficult at times. [A3]

Nevertheless, in both the traditional transactional approach and the more developed relationship the business partner discernibly remained in the position of power as the provider of the crucial financial support.

The findings in the arts managers’ interviews are consistent with the views that emerged from the consultancy interview. Although the consultancy advocates that collaboration is mutually beneficial, the organisation is overtly business facing due to the

asymmetry in supply and demand of business partners. This resides with the proactivity of the arts organisation to make the relationship work and demonstrate its worth to the business partner: *"... ensure that your business partner is pleased..."* The findings clearly indicate that power relations in collaboration are seen as skewed in favour of business. This can be glanced from the consultancy executive's utterance when discussing ethical aspects of collaboration: *"... But if the support is there, from any company, most arts organisations would take it because they need to survive really. It's the world we live in now..."*

Likewise, the perceptions here indicated that the approaches to collaboration vary depending on the needs of the business partner. The traditional philanthropic relationships have been replaced by the incorporation of strategic objectives with clear tangible and intangible benefits for both partners. In some cases, transactional relationships incorporate social orientation, rather than simply seeking organisational benefits:

"... much of the business support in Wales is centred on community engagement, the impact is much much wider than just the business and arts partners alone... So the [example of collaboration], there's teenagers that didn't have any aspirations now wanna do something with their lives. You know, third generation where the family haven't worked and they want to work and now these kids want to go out there and do something with their lives. You know, it's an economic benefit there..."

This interview thus verifies that transactional hybrids entail the capacity to generate benefits for wider society.

8.2.4 Summary of perceptions about approaches to collaboration

Overall, the interviews show that arts and business joining forces through collaboration generates value for society that may otherwise not be available. However, consistent with extant literature, different approaches to arts collaboration exist (McNicholas 2004; Kim 2009; Weinstein 2010). The research shows a persistent power imbalance in arts and business collaboration. Business partners remain in the position of power as the provider of the crucial financial support. The basis of collaboration is,

therefore, transactional. However, the interviews further indicate a continuum of transactional approaches with tactical operational approach and strategic societal orientation at opposing ends. The contributions to value for society vary with the approach adopted. Where transactional collaboration entails long-term, strategically matched and mutually regarding relationships, it is seen as effecting greater magnitude of value potential. A key feature that enables these transactional hybrids to provide superior value is the combining of their distinct resources and competencies through inter alia employee engagement. This produces a unique form of multilevel benefits that entail a developmental capacity and trickle effects (Kolk et al. 2010). The overt societal orientation in selected relationships demonstrates that transactional relationships can and do effect societal value. These transactional hybrids are distinct by the efforts of some arts and business managers to ensure the sustainability of the co-created social value.

8.2.5 Perceptions about transactional value modes and classes of value

The findings from across the groups of respondents show that arts and business collaboration generates benefits that induce different types of effects. The effect varies from a temporary gain linked directly to the activity that stimulated it, to more transforming benefits that provide continual or expedient advantage. The participants referred to personal feelings of gratification from their involvement with the artistic activity which included entertainment and a way to relax that enables them to escape the daily routine. More transforming benefits personally and for other participants were discussed as highly valuable. Some participants felt that engaging in the social life of the arts organisations contributed to their professional network development. Beside the more impactful benefits for participants seen in utterance such as “... shifted my awareness...” (LR) and “... enhance your mind...” (AH), the developmental benefits were seen as being particularly helpful in developing personal locus of control:

“...the offshoots for the kids are enormous, of not just taking part, but they’ve learnt to work with other people, because many of these kids are disadvantaged,

disaffected. We should think about the benefit from them learning new skills and values through being involved in an art project...” (O)

The participants also raised the opportunity to meet a diverse range of people from the local community that wouldn't otherwise occur as a significant benefit. Not only does it benefit individuals personally, but it was perceived as an important contributor to developing social cohesion, as one participant commented:

“...If you know each other in a community, you care about the community more, erm, and you're more likely to behave better towards the others...” (FL)

Although these benefits were largely associated with the work of the arts organisations, participants perceived collaboration with business as beneficial for society. This was particularly the case where collaboration enabled access to opportunities that the arts organisations otherwise couldn't offer and/or if it guaranteed the existence of the arts organisation. Simply helping to keep the arts organisations going and working together regardless of how effectively emerged as a positive outcome for society. These sentiments were summarised in the experiences of two participants:

“DK: ... In Barry, there used to be a huge open air pool built in the 1930s... it was brilliant... By the 90s it was on its last legs... and a big chemical works offered to sponsor it... Town council said absolutely not... and then a year later it closed down and a few years later they just concreted the whole thing over.

JR: Yeah, it's disgusting!

DK: So I think, basically the community benefits from sponsorship.” (interlocution between participants)

Despite endorsing collaboration, it transpired that the participants were largely unaware of who sponsored the arts organisation they frequented. Accordingly, some participants attributed any meso level benefits solely to the arts organisations:

“... giving that hardly any of us knew who sponsored these guys. So I don’t see that the businesses get anything from it...” (MH)

Business partners were seen as providing tangible and intangible resources that included skills and knowledge sharing, awareness-raising and network development. The efforts arts organisations put into securing and keeping relationships were largely attributed to securing income, although some saw it more as a two-way exchange:

“... they kind of help each other, you’d hope [A2] would learn some financial management and that kind of marketing... and the company could get some ideas from the voluntary sector about how they market...” (LR)

Overall then, there was a concord that the business partners gain image and reputational benefits. More sophisticated processes of business capturing benefits, particularly in relationships that moved to employee engagement were raised:

“... “... kind of staff morale and retention... if I was, erm working for [bank] or something, I’d feel less guilty about working for them if I knew it wasn’t just profit or if you’re doing a boring and tedious kind of call centre job, I can imagine lots of people in [business] do, somebody from Glasgow probably hassling them. Yeah, it’s gonna be nice having a random person coming into your office doing kind of bendy acrobatics. It is gonna make you feel better about your work...” (LR)

The trickle effects (Kolk et al. 2010) from the individual level, both employees to their organisations and participants to wider society was observable in this set of interviews. For organisations, it can lead to improved performance even if only temporarily following the activity. On a societal level, the feelings of enjoyment and positive mood can transfer through general social interactions.

Similar to the participants, the employees described the experience of participating in the arts related projects as enjoyable and fun. A number of employees expressed returning from the activities with feelings of personal satisfaction, renewed energy and positive outlook. It afforded the sense of variety in their work and a chance to relax and get

to know colleagues they wouldn't normally meet. For some, the opportunity in itself was valued as being treated as an individual, providing depth of meaning to their role in the organisation:

"... when you are chosen to do things like that, it's showing that you as a person are not being treated as sort of a staff number, it's a nice feeling..." (JW)

Some employees described the benefits simply as intermittent enjoyment: *"... we've had a good day. It was a bit of a break from work..."*. Others felt that the gains were more substantial and provided opportunities for personal development and networking. A number of employees raised a sense of achievement and broadened perspective, particularly if creativity was personally valued. The congruity between personal values and the artistic activity, whether innate or developed due to the engagement, encouraged the individuals to fully engage. This resulted in the experience being seen as more than just an incentive. It contributed to learning, expertise and skills development, network building and locus of control that was both personal and pertinent to their careers. The personal benefits demonstrably transferred to the meso level and contributed to improved employee relations:

"... it'll benefit us and benefit [B2] as well because you will feel more like you wanna work for [B2] now... because they're doing us favours as well..."

Similarly to the participants, funding was identified as the principal benefit that the arts organisations accrued from collaboration. Also recognised was the direct access to a large audience that is typically difficult to reach for arts organisations. This was seen as potentially more sustainable. It can introduce new audience for arts organisations:

"...a lot of people work here and come through. We can do a certain amount of raising awareness and hopefully that drives bigger audiences..." (MP)

More sophisticated exchanges inherent in the complex employee engagement resulted in skills, knowledge and expertise sharing, as well as broadened perspectives

regarding industry specific processes. The benefits were discussed as a unique advantage accrued by the organisations through the relationships:

“... there are things we’ve managed to achieve at [B4] and I’ve probably been better at those because I’ve worked with people at [A4]...” (PR)

Collaboration was also unanimously agreed by employees as positive for society. It was mainly related to the support that the business extended to the arts partner, through which it was able to fulfil its mission more effectively. On occasion, the employees deliberated on experiences that indicated a value transfer from benefits acquired internally to creating benefits external to the immediate collaboration:

“... It’s a broader thing though. Because we went to a graffiti workshop, you’re giving somebody a job at the end of the day... that bloke is getting paid...” (GS)

Yet, it was in no way attributed as one of the aims of the collaboration. It was described as an indirect effect *“... a bit like a virus really...” (MP)* of the investment by the business partner.

The artists emerged as the group that was least inclined to attribute any of the social benefits directly to the collaboration. Despite the doubt over business gains from associating with the arts, the artists deliberated that the association was most likely linked to image and reputation building embedded in the CSR programmes: *“... they want to look good. So when you hear that they’ve made massive profits, they can say well yes, but we’re also part of the community, you know, and that’s important for us. (LS)*. A promise of incentives for the business and its employees was also considered:

“...they might literally get artwork donated to their office... I’ve photographed these odd staff portraits for [B1] and a big part of the idea was for the company to engage more with their workers, somehow... (ML)

In return, the arts organisations received funding and in-kind support that enabled them to create a range of benefits for the participants. The developmental benefits were viewed as

largely applicable to less experienced individuals. These interviews also indicate that cached benefits acquired by individuals can transfer to temporarily enrich the lives of other individuals within their networks. The final product of artistic value produced can also indirectly benefit people and organisations in wider society:

“... people who are actually involved...do, maybe their friends and family also, will be proud of them and pleased, but other than that not much... indirectly the artwork they make may enrich people’s lives...” (ML)

However, the artists didn’t perceive societal improvement as the aim behind collaboration: *“... their main aim is making money and manipulating us really, a lot of the time... I’m a bit cynical...” (LS)*. Nonetheless, the indirect effect can help to improve access to societal spheres that are traditionally elitist. It helps arts organisations to engage disenfranchised communities, create creative development opportunities, improve the quality of the creative industries by producing better skilled candidates, provide a voice for the disenfranchised that can raise awareness of social issues, and improve the sense of well-being in the local community:

“... people can take part. Well over a hundred people turned up at auditions in Barry. And [A1] going there, it creates a buzz, you know, people are coming to film here... These are all places that need a bit of, you know, sunshine. They need attention... These kids don’t get a chance, you know. And it’s fantastic that they can do things like that...” (LS)

In contrast to the participants, employees and artists, the findings from the business managers’ interviews show a heavy emphasis on the organisational level benefits. Even in terms of individual employee benefits, the discussions proceeded in the context of linkages to the organisations, such as organisational pride and identification. Employees of the business were typically seen as either the sole or forming part of the end beneficiaries of the collaborative action. One manager mentioned that collaboration provided employment for the arts employees, yet this was not the primary objective. Similarly, although some managers indicated feelings of personal satisfaction from helping and a sense of broadened

horizons, it was perceived as a side effect of the efforts to secure some form of organisational benefit.

On the organisational level, the managers discussed positive contributions to image and reputation building through publicity and branding opportunities. The resultant raised profile was identified as constructive for recruitment purposes:

"... People know in the community that we're doing this. So we are perceived as a good employer... it kind of comes a bit back to recruiting staff..." (B2b)

Incorporating collaboration into CSR programmes and associating with a community organisation was seen as particularly constructive for image and reputation building as a caring company. It was presented as an effective mode of developing a licence to operate that can create a protective shield for the business:

"... Without our community programme, the CR programme would have a massive hole in it... part of the submission that went to competition commission following an inquiry into our business, part of the sort of, our defence, was formed around the stuff that we're doing in the local community as well..." (B3a)

Corresponding findings to those of the participants and employees emerged. The business managers identified the most desirable and indeed the most valuable benefits related to improving employee relations: *"... Our reputation is clearly important to us but it's definitely staff first..." (B2b)*. At the basic level, the businesses benefited from incentives in the form of entertainment opportunities and free ticket allocation for staff. These provided positive feelings and enjoyable experiences for the individual employees: *"... enriches their wellbeing..." (B2c)*. Beyond the intermittent value associated with the incentives, opportunities to develop staff through training programmes and workshops provided by the arts partners or by allowing employees to directly engage in projects with the arts partners through creating volunteering schemes were discussed as providing lasting benefits the organisation can later utilise. Indeed, the opportunity to involve employees was seen as invariably contributing to improving the performance of the business:

“... if we’ve got happy staff... they’re gonna be giving a better service to our customers and hopefully in turn would mean that our customers are happier, our shareholders are happy. You know, the company makes more money...” (B2d)

Rewarding staff with incentives was associated with leading to intermittent boosts in productivity *“... there’s always a buzz the day after...” (B3b)*. As the individual employee feels appreciated and valued, their morale and organisational identification grows. However, where the individual episodic benefits were combined with the more developmental opportunities that led to acquiring transferable skills or gaining new perspectives, the collaboration contributed to developing operational efficiencies:

“... people who went to those workshops are now managers...” (B2d)

and

“... We have very very low turnover rates in the industry. I think the average for a call centre is about 20, we’re 10–11%. Erm, and clearly this is one of the things...” (B2b)

The arts context was identified by some as particularly valuable for skills sharing. The innate creativity of the arts helps in developing unique projects as uttered by one of the managers. Particularly in instances where programmes engaged employees, the collaboration was perceived as mutually beneficial. The micro level employee benefits, especially cached benefits, were seen as trickling across to the meso level both in terms of the business and the arts partner:

“... So, it’s like an exchange of skills, they have creative skills and help out with that kind of thing... we may loan them an expert to help them with something that they’ve got...” (B1a)

The arts partner’s benefits were primarily attributed to associational value (Austin and Seitanidi 2014). Beyond the crucial funding and in-kind support, the arts organisations were seen as benefiting from image and reputation enhancements. These emerged through image transfer and demonstrating an ability to successfully work with a reputable company

that can lead to further funding leverage and awareness-raising as commented by a manager of a high profile company:

“... I guess having a FTSE 100 company on your list of supporters helps you when you knock on the door of someone else...” (B2b)

The managers felt that their efforts at soliciting introductions by allowing access to their and the employees' networks were highly valuable for the arts partners. Helping the arts organisations broaden their horizons by inducing them to move beyond simply using the arts for aesthetic purposes was considered a long term benefit that the business partners enabled. The most effective arts organisation benefits were related to the practical engagement of business employees. Access to business expertise and the subsequent skills transfer were considered highly effective for sustainable organisational development.

“... our communications officer goes to all [arts partner] meetings. And she can bring new viewpoints on a lot of the decisions and discussions at those meetings from corporate point of view. They can ask her questions on what would a business expect from this point of view...” (B2c)

This was further enhanced by the opportunity to introduce the workforce to the work of the arts organisations: *“... people on site who maybe didn't know what [A1] is all about and they do now because they're tenants here...” (B1a)*. The business managers suggested that such access can contribute to audience/participants and volunteers development and for awareness building for the arts organisation. The degree of impact between purely providing funding and engaging employees was raised by a senior manager:

“... we put funding in, but if I can get employees engaged in supporting that community organisation, it adds value to our donation... I've had people from here go to sort out an IT system for a community partner. That saved that community partner hundreds of pounds...” (B3a)

Generally, the managers perceived joining forces with arts organisations as beneficial to wider society. Business support enables arts organisations to provide opportunities or services that would otherwise not happen due to resource or skills constraints:

“... because of the cheaper rents or whatever it is they get from us, that makes their life a bit easier so they can concentrate more on doing the bits that they do to help...”
(B1b)

Albeit indirectly, the respondents felt that business helps create benefits for wider society that include opportunities to have fun and enjoy life, create employment opportunities for artists and other employees, increasing volunteer provision, facilitate opportunities for personal development and skills acquirement for different individuals and organisations, and creating new networks:

“... I mean these kids are, from being totally lacking confidence, communication skills not good, awareness...zero. And suddenly, they put on this piece of forum theatre and actually toured with it. I mean, it totally changed them, unbelievable. And it was the arts that did that, it wasn't financial education that did that. It could have been any topic. But the arts just totally turned those kids around...” (B5)

It was implied that people outside the collaborative action may benefit:

“... the children's families, all those people are benefiting from feeling proud... I think our customers and stakeholders in the business, shareholders also have a real value and appreciation...” (B6)

The positive effect from the individual participant benefits transmits across to other individuals within their social network, and to an extent, the macro, wider societal level.

In the arts managers' interviews, the respondents converged in viewing the financial and in-kind support provided by the business partners as the principal benefit accrued by their

organisations. In some cases, it was existential: “... without [business partner] support, it wouldn’t exist...” (A1b). Associational value enabled the managers to lever further funding:

“... increasing our income. That’s very, kind of immediate benefit. But it helps to lever other money... [B2] has helped us approach other funders, and means we’re taken a little bit more seriously, it means people are more likely to listen to me when I am talking about, or approaching people for sponsorship...” (A2b)

Rather than just externally, securing high profile business partners reportedly enhanced the confidence of some arts organisations in their mission: “... makes us feel a bit more confident that we are doing the right things...” (A3b). However, these benefits emerged as largely constitutional in collaboration. A number of respondents expressed the need for more engaged forms of co-operation:

“...it’s not just simply giving a load of cash or moral support. It’s them becoming actively involved in what we’re doing... strategic support we can utilise into the future... is far more constructive...” (A1a)

Although not commonly practiced, access to a business partner’s employees or support that incorporates employee engagement was considered as more valuable. It provides opportunities to develop relationships that lead to increased audiences/participants and/or volunteers:

“... for an easy life, it’s great if they can just give us the money and stick their logo on paper. But, having said that, the most successful relationships we’ve got is with [B2]. And, their staff are involved. Although I spend the most of my time on, it’s really successful and it’s developing. So, actually, it’s better if they can be more involved...” (A2c)

The arts managers discussed a range of intrinsic and functional multilevel benefits that included enriching life and individual and civic pride development, etc. (table 12 outlines a full list) that their work provided for individuals and society, including business.

These benefits were attributed both to the funding provided by business and to the co-created unique projects that collaborations develop. The benefits for participants were typically explained as having wider societal implications either by providing intermittent feelings of well-being or longer lasting developmental benefits:

“... those kids can see their teachers perform, and they've seen other young people go up through the ranks, become apprentices and end up on stage. It gives them a sense of their own potential, of their own possibilities. Not just in the world of circus, but in any aspect of life...” (A4)

Table 12: Summary of individual and societal level benefits derived from corroboration study

Benefit level	Type of benefit
Individual	Enriching life; a way of self-expression through creativity; something fun to do and having a laugh; enjoyment and entertainment; providing intrinsic aesthetics; space to explore and express difference and diversity; stretching the mind; self-fulfilment; personal development; gaining locus of control and self-belief; individual and civic pride; sense of belonging; breaking down barriers; bringing difference together; developing skills and expertise; providing work for artists
Societal	Regeneration and returning positivity; building social capital; re-kindling community spirit; providing work for artists; developing skills and expertise; individual and civic pride; breaking down barriers; bringing difference together; providing work for artists

Some respondents indicated personal benefits gained through working with business partners and from their organisation’s involvement in collaborating with business. It contributed to their personal and professional development:

“... Learning to manage relationships right from the proposal, seeing it through and then having the deal finally signed off for three years. It’s a huge thing to put on my CV. But it’s also helped me know that what I’m offering people is good, useful and successful... it’s been a confidence boost...” (A2c)

The managers also indicated a degree of advantage to business employees through personal entertainment and enhanced working environment. Rather than seeing it as a social benefit, it was linked to the efforts of improving business performance. Indeed, business partners were unanimously perceived as expecting benefits effective in supporting the bottom line of the business that included image and reputation enhancement via

associational value, access to audiences to utilise promotion, skills and expertise transfer and staff relations. Some managers mentioned desirability of sales increases through acquiring new customers as the key objective of some business partners. Typically however, business benefits were linked to cost reduction objectives. Image and reputation building and network expansion to create goodwill amongst stakeholders were described as the elemental expectations from collaboration. Incentives and practical staff engagement opportunities that can lead to skills and expertise development were raised as becoming the core of collaboration. Relationships that engaged business employees were considered most likely to lead to mutual long-term benefits. Indirectly, this type of collaboration was associated with greater potential to benefit wider society. The overall positive effect was commented on by one of the arts managers:

“... by getting people who work here and who come here and use this building crossing over if you like with the people who work in those businesses. And so the artists meeting workers from [B2], the [B2] audience viewing the comedy... It’s: ‘my company is working with your company so we’re in it together’ in some way. That adds value...” (A3a)

Despite the overt commercial undertones of business motivates, on the whole, the arts managers perceived collaboration as positive for their organisations and for society.

8.2.6 Summary of perceptions of transactional value modes and classes of value

Overall, the interviews point to different types of benefits across the levels and locations of value creation in terms of the magnitude of impact. The perceived duality of the benefits generated links to the magnitude of its impact and the proximity of the benefit occurrence to its trigger. For example, the recurring episodes describing the employees returning from workshops feeling energised show temporary effect. The value created is transient as the enhanced well-being is only temporary, related to the contact with the experience. On the other hand, the improved skills and expertise gained by the organisations require more commitment to emerge but they become a stored asset for the

organisation. The 'storability' of the cached benefits denotes cumulative value. The difference is connected to the reliance of the benefit's longevity on the collaborative action, particularly in relation to value transfer across levels, both internal and external. Despite the conflictual perceptions as to the possibility to develop self-sustaining mechanisms, the findings show that generating sustainable societal value rests on securing some form of contingency whether through securing external funding and/or support of other cross-sector partners.

8.2.7 Perceptions about principles of societal value creation

The findings from across the interviews show a positive attitude towards collaboration. This is the case even when businesses pursue overtly commercial objectives since arts organisations are in need of funding following public funding cuts. However, replacing public sectors funding with financial support from business emerged as an undesirable approach. This was particularly the case should an arts organisation rely on all its funding solely from one business partner. The participants and employees considered the income arts organisations receive from business as necessary *"...a small a percentage is still a percentage..."* (JR), yet the business partner's freedom to withdraw makes it unpredictable. Financial support from business was seen as best utilised as an additional source of income. Over-reliance on it was perceived as exposing the organisation to instability:

"... some of those who rely heavily on them, that keeps you alive. Whereas if it's only a couple of percent, it's less of a vulnerability..." (RL)

The increasingly scarce public funding was acknowledged as forcing arts organisations into positions where business funding is the only source of income. The participants felt that in such circumstances, developing a set of relationships is more desirable than investing all efforts into a single relationship. The insecurity of a single, substantial relationship was raised by a participant with professional experience in fundraising:

“... It’s safer to have lots of smaller sponsors because if you lose a sponsor, it’s not going to be so damaging. If you’ve got one sponsor that keeps you afloat and you lose that one, you’re in trouble...” (FL)

It was also pointed out that arts organisations focus on developing more long-term relationships that incorporate other forms of support to strengthen the stability of corporate support. Developing relationships that include an exchange of skills and expertise was seen as desirable, as observed in an interlocution between two participants:

“(AH)... When you are able to tie a corporate sponsor down for a period of down, you can then free up the staff and put their time and energy back into schemes or whatever, rather than spending all their time chasing the odd thousand pounds here and there. And things like that.

(LR)... yeah, they can kind of help each other more, [A2] would learn some financial management and that kind of marketing.... you’d think that some of these companies have lots of marketing expertise acumen and vice versa the company could get some ideas from the voluntary sector about how they do things...”

Identifying and working on mutually beneficial projects was identified as an effective way of improving the sustainability of the relationships.

The employees likewise raised the precarity of business funding, particularly for smaller arts organisations that don’t tend to raise enough funding to self-sustain their operations. One employee who was involved in a skills exchange programmes commented that any reduction in income due to the sudden withdrawal of business funding can force a change in mission or in extreme cases destroy a small arts organisation: “... some are very finely balanced, so they wouldn’t necessarily survive at all. Others might have to go more mainstream...” (PR). The interviews indicate that employees consider strategic fit an important element in transactional collaboration. A practical experience of withdrawing funding due to a lack of return on the commercial objectives that was beyond the arts organisation’s power was uttered by the company’s employee:

“... the contract [A3], they’ve cancelled it ... apparently there wasn’t much interest from staff so that was the reason why they cancelled it...” (SG)

Apart from preventing early dissolution, the employees felt that if appropriate alignment is developed, associational value can result in future benefits. It enables the partners to co-develop projects that can increase goodwill amongst desirable audiences that can later be utilised in, for example, recruitment. Where arts organisations understand such a transfer of benefits, it provides a stronger case in defending the collaboration when negotiating further engagement. However, the perceived and experienced volatility of relying on funding from a single business partner observed in the interviews indicates that a mix of funding sources is preferable. Where circumstances impose business funding as the sole stream, the arts organisation needs to approach it strategically and integrate a relationship portfolio.

Both sets of interviews with managers largely reflected the above views. The business managers acknowledged the problematic nature of business funding. They discussed the principles of business funding more generally and some raised practical examples of the difficulties of sustaining a co-created collaborative value. The interviewed business managers perceive relationships with the arts as inherently finite. A senior executive reflected on cancelling a long-term rolling relationship with a community theatre:

“... we are not a sustainable funder. We’re a private company, we have to work for the benefit of [B4] and the benefit of our employees. We’ve always made that point. You know, [A6], we’ve had a wonderful relationship with them that but it can’t carry on...” (B4)

A business manager involved in a socially oriented relationship discussed at length changing social ‘trends’ as an issue that significantly infringes both the longevity of relationships and of the social value co-created: “... things move in sort cycles...” (B3a). This was seen as impacting both the businesses and the arts organisations. All businesses openly disclosed the fact that the collaboration was underpinned by efforts to sustain profitability, supporting the findings of O’Hagan and Harvey (2000) and Moir and Taffler (2004) that image building and strengthening the license to operate by demonstrating community

engagement remain strongly present on the arts supporters' agendas. This factor was perceived as a reason behind changing relationships or social causes, even in relationships where business benefits form compensation rewards: *"... freshen up the programme at some point..."* (B3b), *"... align with our customers and employees needs and preferences..."* (B4). On the other hand, arts organisations may alter their mission or abandon an effective project once collaboration ends, to conform to the demands of the new sources of funding:

"... So [A3] may be able to attract funding say for putting arts into schools or whatever, but three years down the line it's changed, it's now tackling drugs. And so, the sustainability of that project is no longer..." (B3a)

Relying on a single relationship with a business partner in the arts context emerged as a key problem in the sustainability of the social value created through collaboration in the business manager interviews. One respondent raised it as a specific problem that the company faced in attempts to sustain social value co-created through a unique arts educational project:

"... the continuity is not there, because I'm not sure they've got access to other funds. And once we're gone, then the cracks will appear again and pulse will be lost. And the communities that we're operating in will not have access to those services anymore..." (B3a)

Similarly to the participants, the opportunity to use collaboration to help arts organisations develop appropriate skills and expertise to enable them to safeguard the social value created was raised. In addition to improving fiscal stability, learning new skills and developing collaboration, expertise was seen as a key factor to sustaining both the relationships and the value created. Business managers discussed that rather than relying on their goodwill, arts managers need to be proactive in identifying opportunities to reciprocate and suggest novel approaches to enable the business partner to legitimise the relationship to their stakeholders. The managers regarded the arts partner's proactive attitude as one of the deciding factors pertaining to both establishing more complex relationships, as well as their longevity:

“... [A3] think outside of the normal pattern and we thought we like this organisation, they make it easy for us. So that’s why we keep [A3] going...” (B3a)

Some managers mentioned relationships, the existence of which was down to the ability of the partners to jointly identify a specific fit. In particular, a fit between the employees and the arts partner was seen as highly desirable. A couple of managers raised direct engagement of individuals in the collaboration as a crucial factor in explaining the internal stakeholders the worth of the relationship. The first-hand experience and improved understanding of the impact of collaborative value was seen to promote the collaboration within the organisations:

“... the guy who is the numbers’ mentor... he is a member of the subsidiary board, he is mixing with the Financial Director, the CEO on a daily basis... telling tales of the team challenges and their volunteering and that’s feeding back up to the main board. So if people that they’re dealing with on a daily basis are getting involved in it and recognising it’s producing benefits, that enthusiasm is enthusing them as well...” (B3a)

Such employee buy-in was seen as a highly effective way to legitimise collaboration with an arts organisation. Accordingly, a lack of or a bad strategic fit between the organisations emerged as a factor that led to the early ending of transactional relationships. This was particularly the case where focus was primarily on operational objectives:

“...It was getting to the point where it would have cost a lot of less money for us just to buy tickets and give them to staff, as opposed to have the sponsorship...” (B2d)

A proactive approach to learning and advanced forms of organisational learning with respect to collaboration emerged as a conditioning factor that stimulates and maintains transactional relationships. It also enables the partners to ensure that the social value co-created can be sustained.

The arts managers largely mirrored the perceptions of the business managers. There was a strong agreement that dependence on any one sort of income can be highly

detrimental “... *having a good mix is crucial...*” (A4). Business funding forming the basis of income for community arts organisations can expose the arts organisation to volatility inherent in business support and can impede independence in pursuing the espoused mission: “...*it should cushion, caress what’s already there. I think as something instead of government funding, you get into very dangerous territory...*” (A2b). Some arts managers felt that business funding, providing that it constitutes an ‘add-on’, can enrich the programming:

“... [B2] sponsor the children’s education packs. Which is great because it was an area of weakness within the organisation. So it certainly enriches what we do in terms of the arts...” (A2b)

The findings here indicate that the arts managers recognise the necessity to avoid relying on a single business partner in running the organisations. All the interviewed arts managers mentioned a set of business partners who contribute in different ways to their ability to achieve their mission. They acknowledged that large corporate supporters are highly desirable, particularly where the collaboration extends over at least two years and is secured through a contract. Losing such support is clearly damaging, particularly if unforeseen, yet it is mostly not perceived as threatening to the organisational existence:

“... losing someone as big as [B2], it wouldn’t be as drastic as having to fold, but there would be a huge dent in our budget. And we’re kind of keen to minimise that and make sure we’ve got money coming in from different areas...” (A2)

Some arts managers acknowledged that specific projects developed through collaboration, however effective, can become vulnerable once the corporate partner decides to no longer invest in it. Unless a new partner that seeks objectives complementary to those of the projects can be engaged, the project is likely to be abandoned.

The arts managers displayed a relatively high degree of awareness of the need for a proactive approach to managing collaborations on their part. Although not always practiced due to resource shortages, the majority of arts managers perceived it as crucial to attracting a business partner and for sustaining the relationship over time. Being proactive in finding a fit between the organisations was considered the key aspect that helps arts managers to

secure advanced forms of relationships with businesses. Offering opportunities for the business employees to directly engage and experience first-hand the effects of collaboration was seen as the basis of more advanced collaboration. It essentially raises the awareness and contributes to a better understanding of collaborative value:

“... when [B1] come to the premier and you have individuals from Bridgend receiving awards and they talk about, you know, what it means to them... [B1] talk about that as the reason why [they] have invested...” (A1b)

The arts managers further recognised the need to continuously improve their understanding of how collaboration benefits all three parties, themselves, the business, and society. Some discussed completing evaluations as an effective mode to inform themselves and to demonstrate the impact of the collaboration to the business partners:

“... we do evaluations... mainly because if it's gone well, we can go back to them and say: look, you know, all the stuff that we've achieved, you know, it really helps to make a good case for support to develop...” (A2c)

The enhanced organisational learning that these processes led to emerged as a highly effective driver of further, often more advanced relationship approaches. A greater understanding of how to manage an effective collaboration and its value can help prevent relationships from ending prematurely.

The interview with the consultancy shows that a high degree of understanding the multilevel outcomes of collaboration is a significant factor in establishing collaboration. In this regard, the consultancy offers seminars for both business and arts organisations with the view of helping to converge the perceived divergent value frames and improve understanding of the bilateral expectations and potential outcomes. Although the consultancy promotes arts and business collaboration, the interview shows that arts organisations are strongly discouraged from over-reliance on business support in favour of diversity in income.

The findings show that a number of organisational level factors shape the functioning of collaboration. Where these factors support the longevity of a relationship and

a more complex structure through cross-organisational integration, the generated collaborative value can deliver multilevel benefits. The organisational level factors, therefore, ensure that the structural and governance mechanism are in place to sanction greater value creating capacity even in transactional collaboration. However, the respondents across all sections of interviews identified people who are involved in the relationships as a major element that conditions collaborative value creation. One of the participants raised this whilst discussing the prevalence of self-interest in business motives imbued in the “... box ticking exercise...” (MH) approach to collaboration:

“... But to be fair, yeah, that happens but then, actually it’s individuals within that company that made decisions about it. So it’s kind of, some of these companies might be bigger mean corporates, but it’s kind of normal people that work for them that made those decisions...” (LR)

Individual influence on collaboration was discussed as both positive and negative by the participants. Some felt the problem with establishing advanced relationships can be linked to the personal attitude of those in charge of the relationships. One of the participants talked about potential disinterest of the person in charge of the relationship in the value that collaboration can generate or a lack of awareness of its potential impact:

“...maybe there could be more of this kind of sponsorship if the person who is like ticking the boxes, if they were made to realise what good that sponsorship can do... if they had greater awareness... they’d be happy to do it and they’d go home at the end of the day feeling good about themselves too...” (DK)

The artists and employees likewise identified the personal values and interests of individuals as elemental to creating collaborative value. A favourable personal attitude was raised as a factor that initiates the existence of the arts organisations, whether through establishing it or by facilitating funding and support. Since the arts organisation is essentially the platform through which any collaborative benefits are created, the arts executives’ personal commitment to its existence is one of the underpinning factors of collaborative value:

“... I think [A1] is probably set up because the people involved in setting it up were interested in [arts form]... so the wants and so on of [A1] are really his wants...” (ML)

Beside the arts executives' personal values, the employees discussed their company's involvement in social initiatives as directly related to the personal values of the managers and executives in positions of power. Selecting the arts as a specific context through which to pursue community engagement was repeatedly linked to the responsible manager's personal appreciation or interest in the arts. Micro level value transfer in terms of the senior executives actively promoting the arts partner and incorporating them into the community involvement strategy was raised:

“... it's down to [Head of CSR], she's really raised their profile and actually drives a lot of this. From my previous office, I was just not aware of a lot of this activity. So, she's really done a lot to make everybody sort of aware of what actually goes on...” (MP)

The successful and effective implementation of such strategy was perceived as resting on the advocate's personal efforts and 'expert power' (Daellenbach et al. 2013). However, the employee interviews further indicate that in order for collaboration to be effective, particularly where the principal aim is organisational gains, employees need to share in the decision to direct community engagement towards engaging with the arts.

Personal values linked to an appreciation of the value of the arts compelled individuals to engage fully with the programme. It enabled the individuals to appreciate the wider positive impact of the arts. Such personal understanding encouraged the individuals to help diffuse the relationship throughout the organisation:

“... I push very much for it, because I'm from that background... so it's something I love...” (GS)

and

“... I love what they do... and you can actually push it through the organisation. So every now and again, what I try to do is make sure like flyers and things like that go around...” (MP)

The shared world views and cached benefits that individuals captured through engaging in the collaboration aided the institutionalisation of the relationship. In effect, the employee interviews suggest the longevity of collaboration links with employee buy-in, which is secured through personal values.

Equally, personal values and personal relations transpired as a significant mediating factor of the efforts to generate societal value in the interviews with the managers responsible for managing the relationships. There was a concord across the business and arts manager interviews that collaboration is no longer an altruistic act or a personal whim of a high ranking executive. Arts-based collaboration, like all other community engagement programmes, was portrayed as being constrained by the corporate strategy and the need to fulfil objectives and guidelines:

“... the CEO has passion for the particular art, but obviously, for it to tick boxes within the company and for it to work, there obviously is marketing behind that...” (A1b)

What was evident in the interviews, however, was that in most instances, the business managers responsible for the community engagement programme were able to direct the company’s collaborative strategy or at least a part of it towards the arts. These business managers were able to fashion a fit through the expert power they possessed about the arts. In concord with Deallenbach et al. (2013), the expert power linked to a deep understanding of the value of the arts is based on personal experience and preferences; this was explained by the senior community development executive at B4 in an interlocation:

“... If I’m absolutely honest with you, the reality of that is, I have my degree and my background is art... I really do get what these arts organisations are doing. The arts-based projects we’ve supported are not replicated in any other of our locations... and I know it’s categorically because I have developed it...” (B4)

Similar elements of personal preferences were discussed by a number of respondents as the antecedent to establishing collaborations or indeed the reasons for a collaboration ending. Typically, it was linked to the senior executives or individuals in position of power in both the business and the arts organisation. The experience of a

collaboration ending by a business executive and the personal preferences of decision makers significantly mediates the cumulative process of collaborative value:

“... after the first year, they didn’t want to work with us anymore... They loved the outcomes, but one of their governors had seen negative press about us... it was down to personal views...” (B3a)

The business managers, however, felt that beyond the initial contact and the decision behind the existence of the collaboration, the decision makers’ personal interests require support by a wider appreciation amongst the staff. Multipoint relationships development between the collaboration partners in order to secure the relationship long term was raised as a significant factor in considering the effectiveness of individual relationships:

“... you get members of staff where they get attached to projects, who form relationships themselves and they want to keep it going... and to be honest, they’re the ones that we will keep going as well...” (B3a)

Such employee ‘buy-in’ and improved understanding within the organisation of the value of collaboration was then discussed as a reason for continued and increased efforts to retain the collaboration long-term.

The arts managers’ experience with collaboration appears to substantiate the perceptions of the business managers. There was a strong emphasis on the individuals involved in managing and/or participating in these relationships as contributing towards the development of the relationships. Across all respondents, personal values were deemed as driving the relationships: *“... there’s a certain amount of individual desire within companies... often it’s down to individual desires...” (A2a)*. The senior executives of the business partner, typically the CEO, or the person in charge of the community engagement, were seen as being able to fulfil their personal values through collaboration: *“... I know that [senior executive] is a strong [A2] supporter anyway and she wanted to get involved with us...” (A2c)*. However, the experience of some managers indicates that it is not necessarily the reserve of the top executives. As commented on by an arts manager, the decision behind

the company's engagement with a certain arts partner can be significantly influenced by lower ranking individuals (Daellenbach et al. 2013):

"... Normally, it's two people saying, okay, so what strategy do we cook up now to persuade those guys up there to sell them this. Yes I think it's much more informal and much more casual than most people think. At least, in our experience it is..." (A4)

Indeed, the arts managers were keenly aware of the need to penetrate deeper into the business to secure and strengthen the relationships over time. The need to develop multipoint relationships within the partner organisations was described by an arts manager through an experience of losing a sponsor:

"... we used to have a relationship with [business] because the marketing person was a really keen fan of arts... he left and a new person came in and suddenly, our sponsorship relationship finished because he was interested in rugby..." (A5)

The arts managers overall felt that collaboration is about developing relationships with their counterparts. Personal relationships help move collaboration from formal negotiation processes and constantly worrying over losing the partner – as commented by one managers *"... tiptoeing around, not really knowing what they want..." (A3b)* – to being able to openly discuss the needs and possibilities of working together in a relaxed atmosphere.

The implications of personal values and shared worldviews factored as important elements in the principles of collaboration from the consultancy's perspective. It was acknowledged that since the business budget holders are people, their decisions are inevitably influenced by what they like: *"... They are human beings and you know, there's gotta be that element in there. It's gotta achieve business objectives but they've gotta feel something for it as well..." (C)*. However, this interview strongly indicates that the focus has re-oriented on promoting collaboration where relationships are institutionalised using employee engagement. This approach is promoted as providing more stable relationships.

8.2.8 Summary of perceptions about principles of societal value creation

The evidence shows that since arts funding is increasingly scarce, even mere investment in the arts organisation's mission is desirable. There was however a perception that since business partners can be fickle due to the need to respond to market pressures, transactional collaboration can be volatile. Relying on a single transactional relationship to sustain operations and attain the mission of an arts organisation is myopic. To improve stability and protect the value generated, arts managers need to develop multiple transactional relationships that can substitute a sudden loss of support.

In addition, collaborative arrangements require the capability to co-create unique benefits for societal value to emerge. Co-creating innovation is contingent on an expert understanding of how to most effectively align and combine the distinct partner resources. Independent experts can supplement the deficiency in understanding the processes of identifying a fit. However, developing internal expert knowledge of the worth of collaboration and its multilevel impact can help extend the lifespan of a transactional relationship.

There was a strong perception across all respondents that the specific collaborative arrangements reflected the personal preferences and behaviours of the individuals involved. The interaction between these individuals was strongly influenced by their personal values and resultant actions. The human factor was shown to mediate the ability of arts and business organisations engaging in transactional collaboration to generate value for society.

8.2.9 Perceptions about functions of the business partner

In the interviews with participants and artists, business partners were mostly regarded as helping the arts organisations to better fulfil their mission. Working synergistically through a shared vision to produce societal value was not recognised as a motivating factor by either group. One of the artists stated that moving towards 'symbiotic relationships' is desirable, yet improbable:

“... there may be opportunities for the business to actually be more involved. I don’t know how that would work but, I really struggle with that one to be honest because I can’t understand why a business would want to do it...” (LS)

Similarly, none of the participants were aware of projects where the partners co-created novel forms of value. Businesses were seen to be involved for self-gain rather than aiming to contribute to societal betterment: *“... In my opinion it’s all about look at us... self-gain...”* (JR). However, although unable to provide specific examples, some participants disagreed with such sweeping generalisation:

“... it’s easy to think that all businesses are just selfish, or they’re just helping themselves, but I think, even with big business, there is probably more of a spectrum...” (DK)

The existence of businesses that are at least trying to incorporate social objectives was acknowledged by participants. Overall, these findings suggest that artists and participants perceive the business to function as a facilitator rather than directly co-creating societal value with arts organisations.

Likewise, in the employee interviews, any positive contributions to society were attributed to the support that the business provided to the arts organisations. This then enables the arts organisation to fulfil its mission more effectively: *“... it’s sort of supported by the cash given by [B2]...”* (JW). On occasion, the employees deliberated on experiences where benefits accrued internally and indirectly generated value outside the immediate collaboration, such as paying the artist delivering a workshop. Yet, it was in no way attributed as one of the aims of the collaboration and was rather viewed as a residual effect of the investments made by the business partner:

“... It is indirect and I think that’s what happens with a lot of linkage, doesn’t it? You know, it’s actually, you’re not even aware of it, a bit like a virus really...” (MP)

Contrasting findings were observed in the business and arts manager interviews. In these datasets, both functions of the benefits facilitator and benefits co-creator can be

identified. The findings indicate a continuum of how the business partners approached the role to create value for society. For some, collaboration is primarily an investment opportunity. Social benefits, in the form of an arts organisation's ability to better fulfil its mission, were desirable but not principally motivating:

"... the artists and things, it's definitely nice to have... we can hopefully support that, it's great. But it wouldn't be a focus of ours..." (B2d)

Another category considered the social aspect as part of the overall collaboration objectives. These businesses manage portfolios that also feature projects where they actively partake in creating unique social benefits as an outcome of pooling distinct resources:

"... to increase the financial capability of the young people, that's our overall aim in community programmes... We want young people to be able to go out in the big wide world and be able to manage the money they have..." (B5)

This approach appeared project focused with a strong emphasis on specific output rather than ensuring lasting outcomes. Moving towards ensuring that the unique innovations co-created through collaboration were self-sustaining by developing supporting structures in institutional infrastructure emerged as the other continuum end. This extreme end was seen as problematic as described by a senior executive of a business that co-created a unique arts educational project:

"... Since we've stopped the funding... in terms of [arts partner] providing any sort of projects for the schools, I don't think that exists... we're basically cementing over a problem and once we're gone, then the cracks will appear again, pulse will be lost and the communities will not have access to those services. Through our experience over the last seven years, is that sustainability, erm, we have struggled with it. In terms of how we are going to try to make this sustainable..." (B3a)

The findings suggest that the latter two categories function as social benefits co-creators, yet the extreme end is distinct by active attempts to co-create societal value.

The arts managers concurred that all forms of transactional collaboration are beneficial, yet some approaches are more desirable. The categories relate to the need to “impress” certain partners with what the arts managers can offer, as opposed to those partners that work proactively to develop relationships that can benefit both parties. Facilitating social benefits was considered an indirect outcome of the collaborative action. It enabled the arts organisation to remain operational, as commented on by an arts manager: *“...they’re allowing us to pay the bills or stay open, to put it in very crude terms...”* (A2c). In contrast, the co-creators were described as typically approaching the arts with a blueprint or a desire to co-create social benefits, whilst at the same time pursuing improvements of the bottom line of their business:

“...we run a programme together... with primary schools in deprived areas... [B3] do get a bit of profile raising, but I don’t think they’re in it for that because they don’t ever seem to worry about it... they’re just very much about dealing with the children and making sure the children have a good experience...” (A3b)

This set of interviews indicated that although highly desirable, this form of collaboration in the arts context is rare. The rareness of this approach can be gleaned from the paucity of experience of the arts managers with the processes of societal value co-creation. Practical experience in such processes transpired as a distinction between seeing no immediate solutions beyond the continued support of the business partner [A3], and engaging other cross-sector actors to sustain the social value co-created in collaboration. This was commented on by the only arts manager with a practical experience of co-creating support mechanisms in the societal infrastructure:

“... we have support from the First Minister... he then engages with our partners... sort of discussing what we do together, how we support the development of the apprenticeship scheme with the government, how that links into the development of [B1’s] strategy in terms of brining those apprentices in to the loop with us...” (A1a)

In some transactional hybrids, the alignment of organisational and individual factors enable the business partner to function as a societal value co-creator. The organisational benefits remain a necessity to legitimise collaboration with the arts internally. However, the overt social orientation and the conditioning factors observed in the interviews transform the societal value potential imbued in the cumulative value generated internally into sustainable societal value.

8.2.10 Summary of perceptions about functions of the business partner

The interviews show that it is rare in arts and business relationships for the partners to possess sufficient experience to generate societal value. Apart from the arts and business managers with practical experience in co-creating social, and on rare occasions, societal value, the respondents considered the business partners as pursuing self-interested objectives by investing in the arts. Business partners, therefore, most commonly function as facilitators of social value produced by arts organisations. However, with their paucity in the arts context, business partners can and do assume a role of a co-creator of social and societal value.

8.3 Corroboration of the propositions and themes

The above findings enabled a re-articulation of some of the propositions and refinement of the themes into three overarching categories: the principles, manifestations, and functions of the business partner. Table 13 below provides an overview of the final propositions and themes. The role of the beneficiary and the approaches to collaboration form part of the principles that influence the ability of transactional collaboration to generate value for society. Themes 1 and 2 derived in the conceptualisation are integrated under the 'principles' theme. The following section will re-articulate the propositions outlined in chapter 7 and group them under the refined themes.

Table 13: Summary of study themes, sub-themes and propositions

	Theme descriptor	Sub-themes and Propositions
Theme 1	Principles of societal value creation through transactional collaboration	<p><i>Target beneficiary role</i></p> <p>1: Target beneficiary is a co-creator of collaborative value in the arts context due to the relational process of producing artistic value. As co-creators of collaborative value, value generated at the target beneficiary level in the community arts context is internal to the collaborative action, not external to it.</p> <p><i>Transactional collaboration approaches</i></p> <p>2: Transactional arts and business collaboration exhibits two distinct relationships approaches: traditional and hybrid.</p> <p>2a: Arts and business collaboration employing transactional hybrids that are socially oriented, strategically combine distinct competencies and exhibit high levels of engagement across company hierarchies is more likely to contribute to societal betterment than operational tactics imbued in traditional transactional relationships.</p> <p><i>Moderating factors</i></p> <p>3: In the arts context, cumulative societal value in transactional collaboration is more likely to emerge from a portfolio of parallel/consecutive relationship, than from a single dyadic relationship that evolves over time.</p> <p>4: The capability of an arts organisation to generate cumulative societal value through a portfolio of transactional relationships is likely to be moderated by specific organisational and individual level conditions.</p> <p>4a: On the organisational level, the ability is likely to be conditioned on: i) the mission of the focal arts organisation remains unchanged across the portfolio and the purpose of the collaboration in every relationship centres on attaining this mission; ii) organisational learning at the focal organisation supports the integration of transactional hybrids in the portfolio.</p> <p>4b: On the individual level, the ability is likely to be conditioned on personal values and behaviours of individuals involved in collaboration as follows: i) executives facilitate and support the existence of such collaboration; ii) employees' commitment is secured; iii) internal and external beneficiaries self-select and participate proactively.</p>

Theme 2	Manifestations of collaborative value in transactional collaboration	<p><i>Collaborative value modes</i></p> <p>5: Transactional art and business collaboration is likely to generate two distinct value modes: transient and cumulative.</p> <p>5a: Cumulative value mode constitutive of cached benefits that occur with a time delay but are enduring and formative is more likely to contribute to societal betterment than the transient value mode emergent from episodic benefits that produce instant yet ephemeral and marginal advantage.</p> <p><i>Classes of collaborative value</i></p> <p>6: Transactional arts and business collaboration is likely to generate two distinct classes of cumulative value: cumulative social value and cumulative societal value.</p> <p>6a: Cumulative value that attempts to generate systemic solutions beneficial to a wide range of constituents within and outside the collaborative portfolio is societal rather than social. Cumulative social value denotes cumulative value generated within collaborative arrangements.</p>
Theme 3	Functions of the business partner in cumulative societal value creation	<p>7: In the community arts context, the role of the business partner as a benefits provider (co-creator) is distinct from the role of a benefits facilitator in generating societal value.</p> <p>7a: The business partner's ability to function as societal value co-creator, rather than a facilitator, is likely to derive from the partner's direct and proactive participation in the social value generating activity.</p>

8.3.1 Principles of societal value creation through transactional collaboration

8.3.1.1 Target beneficiary role

There is evidence to support the proposition that since target beneficiaries of the arts organisations are co-creators of collaborative value, value generated at this level is internal, not external as currently promulgated in research (c.f. Austin and Seitanidi 2014). Accordingly, value created at this level cannot be considered societal. It is created within the collaborative arrangements that according to Seitanidi (2010) constitutes social outcomes,

rather than on the macro, societal level. The participants and artists reported participants' self-selection and practical engagement as the source of all value in collaboration.

Employees of the partner organisations are part of a nested beneficiary group if that is their organisation's aim. However, without the participants, the existence of the arts organisations would be futile, thus pre-empting the logic of collaboration.

The employees, arts managers and business managers were divided between the participants and the employees as end beneficiaries, depending on whether the business partner's focus was solely self-oriented or it incorporated social objectives. However, when asked to consider the broader worth of collaboration, beyond the collaboration organisations, a strong concord was observed that participants must exist to warrant the arts organisation's existence upon which all other value is built. There seems little doubt that value capture depends on the individuals' self-identification as the potential beneficiary and a proactive response to the process of co-creation is central to generating collaborative value in arts and business collaboration.

The findings here suggest that moving beyond the organisation-centric understanding of collaborative value outcomes enables a consideration of how value emerges in specific social context and marks alternative processes through which collaboration can generate value for society. This seems similar to Di Domenico et al.'s (2006: 900) suggestion that "there may be variance in the morphologies of collaborations... contingent upon the nature of participating organizations and the context in which collaborations take place".

8.3.1.2 Transactional collaboration approaches

There was a definitive concord across all groups that more advanced relationships, especially those that involved employee engagement, generate more significant benefits for all parties, including society. The advanced relationships were discussed as allowing partners to find unique ways of co-operation that can result in innovative projects. The value created benefits for the multiple individuals and organisations directly involved in the collaboration, and also entail the potential to directly benefits external actors. Where transactional collaborative arrangements contribute to developing supporting structures in wider society,

through for example institutional policy change, the cumulative social value created internally can be accessed by actors that are not directly involved in the collaboration.

The framework, therefore, identifies a significant difference in the aptitude to generate societal value of traditional transactional collaboration and transactional relational structures that display hybrid characteristics. The advanced value contributors integrated into the transactional hybrids structure and governance enable the effective pooling of distinct resources and more complex interactions that drive innovation required for societal value potential to materialise. The findings confirm the views of Austin (2000, see also Austin and Seitanidi 2014) and Googins et al. (2007) that systemic social change requires more complex forms of collaboration.

8.3.1.3 Conditioning factors

The interviews indicate that the arts context is characterised by a prevalence of transactional relationships. The unpredictable and relatively short lifespan of transactional relationships can threaten the existence of nonprofit arts organisations that rely heavily on a single relationship with a business partner. A set of transactional relationships was suggested as an effective alternative to overcome this shortcoming. Not only can the different relationships contribute different resources, but they can also substitute for an unexpected loss of a relationship. Even if only temporary, it allows the arts organisation to find a suitable substitute without falling into fiscal disarray.

Although little experience with societal value creation was observed, it was evident that for a co-created project to produce societal value, any parallel or subsequent relationship needs to be managed along a consistent aim. It protects and extends the cumulative value produced through the diverse cached benefits across micro and meso levels in a relationship that is dissolving. Where an arts organisation has no current or is unable to secure a replacement relationship, it is unlikely to retain the mission focus. The societal value potential generated is lost. The participants commented that the limited efforts of businesses to actively partake in creating social value relates to a lack of understanding of the value potential from arts-based collaboration of the managers responsible for collaboration. The employees felt that directly participating in the

collaborative action helped them appreciate the potential impact on the personal and organisational level.

The business managers similarly opined that securing buy-in across the company stimulates understanding of the value produced which helps to justify arts-based collaboration. The arts managers are expected to be proactive in identifying the most effective mode of collaborating and to prove its worth.

Based on this knowledge, further collaboration and greater commitment from the business partner is decided. The arts managers concurred that demonstrating a strategic alignment underpins alliance creation and that organisational learning achieved either through practical engagement or demonstrated using evaluation form the key drivers of successful and continued collaboration. There is, therefore, some evidence to support the proposition that mission focus and advanced organisational learning are important factors that condition the value generating ability of arts and business transactional collaboration. What is evident, however, is that it applies to all collaborative value rather than just societal value creation.

The interviews revealed senior executives' personal preferences behind the existence of collaboration as well as its active driver. Personal experiences that support shared worldviews and the development of interpersonal relationships between individuals within the collaborative arrangements factored in the longevity of the relationships. The business decision makers either directly acknowledged an active role in forging relationships with the arts, or implied it by talking about the sense of personal satisfaction from helping the organisations. Their personal appreciation of the arts and understanding of the potential impact encouraged them to incorporate arts collaboration into the business strategy. The arts managers clarified that the decision maker's personality helps to initiate a relationship, yet it is typically necessary to embed the relationship in the business partner's organisation by developing multipoint relationships to sustain the relationship long-term. This leads to widespread awareness of the relationship and its impact.

The evidence found in support of proposition 1 provides corroborative evidence that the internal and external beneficiaries' positive co-creation response is a contingent in arts-based collaborative value creation. These findings are consistent with the views of Ryan and Fahy (2003) and Daellenbach et al. (2013) that congruent personal values and a deep appreciation of the effect of the arts on society influence decision making related to

collaboration. Accordingly, as this research shows, they condition collaborative value creation.

8.3.2 Manifestations of collaborative value in transactional collaboration

8.3.2.1 *Collaborative value modes*

Respondents across all groups identified different types of benefits across the different levels of value in terms of the magnitude of impact. The respondents reported experienced and/or potential individual benefits. These ranged from intermittent feelings of personal well-being directly related to the 'imprint' of the arts experience to more impactful benefits related to personal and professional development that included expanded social networks and improved community life, etc. This confirms Brown's (2006) view of the social dimension of arts benefits consisting of three nodes: individual, interpersonal and community. The developmental benefits denote the outcomes of innovations arisen from the co-created value rather than the general artistic provision.

Dual benefits also emerge on the macro level. These are largely commensurate with the benefits captured by the individuals. The exception is where cached individual benefits result in intermittent enhancements for individuals, to include the relatives and teachers of the participants and consumers of the created art work. However, where supporting structures develop to sustain the cumulative value created, cached benefits such as improved access to opportunities, improved social and cultural capital and other systemic changes, such as restructured educational systems or volunteer systems, materialise.

The partner organisations benefit from improvements to profile, image and reputation that were directly linked to association with the partner. However, they also capture long-lasting benefits from improved operational efficiencies related to skills and expertise transfer.

The respondents associated the difference between the two types to the magnitude of its impact and the proximity of the benefit occurrence to the action that stimulated it. Episodic benefits are the operands of transient value. The effect expires with or shortly after the stimulating action. Cached benefits can be utilised in the future and are likely to result in improved operational efficiencies. The 'storability' of the cached benefits denotes cumulative value. The more stable cached benefits support cross level value transfer.

The findings support the views that cached benefits are distinct from episodic benefits. They produce cumulative value that ensures a sustained advantage to the recipient independent of the collaborative action.

8.3.2.2 Classes of collaborative value

There was a conflict in the perceptions of the respondents regarding the ability of arts and business collaboration to generate societal value. The majority of respondents were unaware of collaboration between arts organisations and businesses that co-created value for society. However, two sets of business and arts managers described the practical experience of co-developing projects where distinct capabilities were combined and produced innovative solutions. The organisations worked closely together and with the co-operation of the target beneficiaries produced benefits that can improve personal locus of control and access to opportunities that otherwise may not happen. This validates the proposition that transactional collaboration creates cumulative social value which is internal to the collaborative action.

However, these managers raised concern about the sustainability of the social value created beyond the collaboration ending. It seemed necessary to safeguard the social value by developing supporting structures by securing external funding or by developing new societal processes, both of which centre on co-operation across the three societal sectors. However, beyond the set of managers that were involved in the case study, only one business discussed an attempt to secure the cumulative social value generated through a unique arts educational project by involving other cross-sector partners. No other awareness or practical experience was evident. This would suggest that arts and business collaboration generates societal value potential, yet the ability to transform it to societal value is rare. This is consistent with the findings of Kim (2009: 5) that “while there are suggestive examples of the nonprofit arts-businesses relationships based on ‘reciprocity’ or ‘mutuality’” they appear to be more theorised “than giveaway in practice”. Accordingly, this research finds a scarcity in the ability of arts and business transactional collaboration to generate value that can induce societal betterment.

8.3.3 Functions of the business partner

It remains rare in arts and business alliances for the partners to possess organisational learning and/or a personal resolve of a decision maker to warrant and advocate collaboration where socially oriented objectives form part of the overall objectives. The majority of respondents considered the business partners as pursuing self-interested objectives. They invest in the mission of the arts organisations as a way of seeking associational value or employee relations and social value is a residual effect.

The experienced managers described projects where business partners actively attempted to partake in creating social value. Social objectives are incorporated as part of the long-term strategy of improving the bottom line of the business. Cumulative social value improves social capital in the locality that benefits the business in the long run. However, as with the dearth of societal value outcomes, being a social value co-creator is not a common function for businesses to assume in arts and business collaboration. The business managers whose companies assume the role of the social benefits co-creators described a long history of arts support and through past learning, progressed towards advanced forms of collaboration.

The research here appears to partially support the findings of Eccles et al. (2011) that companies with long history of engaging with social objectives outperform others.

8.4 Summary

This chapter used a qualitative study to corroborate the themes and propositions identified in the case study. The interviews were analysed against the five themes and the related propositions delineated in chapter 7. The subsections provided alternative perspectives on the different themes to increase understanding and clarify meaning, as well as to validate the case study findings. The proposed conceptual framework groups the initial propositions into three dimensions of how nonprofit arts and business transactional collaboration creates value for society: principles, manifestation, and functions of the business partner.

The final chapter will close the thesis with a concluding discussion of the findings presented in chapters 6, 7 and 8. Contributions of the thesis to academic, practitioner and policy knowledge and future research avenues will be presented in the final sections.

CHAPTER 9: RECAPITULATION

9.1 Introduction

This study set out to examine value creation through NPO-business collaboration. This has been achieved by investigating transactional collaboration in a specific setting, the arts. The examination proceeded by conducting a multi-method interpretive empirical investigation. It utilised a qualitative case study corroborated through cross-sectional depth interviews as a way of gaining an understanding of the ability of transactional collaboration in the arts context to generate value for society. Value creation in NPO-business collaboration literature has provided both the theoretical wellspring, as well as an area of knowledge that the conceptualisation aims to enrich. The initial section of this final chapter will discuss the extent to which the research problem has been addressed. The following section will then consider the findings in light of the academic contributions, and managerial and policy implications, before reflecting upon the possible limitations and recommending directions for future research. The final section provides a coda and a closing thought.

9.2 Concluding discussion

It is proposed that this study has derived a number of significant findings and that these have implications on theory building in NPO-business collaboration, collaborative value creation and arts and business collaboration literature. Primarily, we can conclude that arts and business organisations can and do contribute to societal betterment through transactional collaboration. The thesis extends three dimensions in support of this proposition: the principles, manifestations, and functions of the business partner in societal value creation through transactional collaboration in the arts context. The following section discusses these findings and their implications.

9.2.1 Principles of societal value creation through transactional collaboration

Arts and business organisations generate societal value through transactional collaboration and it is possible to extend three principles for this as initially explained in the literature review: target beneficiary role (chapters 3 and 4), transactional collaboration approaches (chapter 2 and 3) and conditioning factors (chapter 3).

As was discussed at the outset of the study, transactional NPO-business collaboration has faced questions regarding the extent to which it fulfils the promise to deliver social good that contributes to societal betterment (Ashman 2001; Porter and Kramer 2006; Bowen et al. 2010; Seitanidi and Lindgreen 2010). Within the arts context, it is often seen and indeed researched as a practice aimed at securing organisational benefits (O'Hagan and Harvey 2000; Moir and Taffler 2004; Weinstein 2010, Preece 2010). The lack of understanding of the more social function of this approach to collaboration was discussed in chapters 3 and 4 as relating to the predominant business-centric standpoint through which collaboration has been researched. As shown in chapter 4, this is particularly pertinent to its application in the arts context. The thesis has attempted to redress this by taking the arts NPO standpoint to gain unique insights into how this type of collaboration benefits society.

To further delve into the social aspect, the beneficiary perspective was integrated (Le Ber and Branzei 2010a). Moving beyond the organisational view has shown that the target beneficiary of the arts organisations needs to be approached as a distinct group with a specific role in collaborative value creation as shown in sections 3.3.1 and 3.4.3. Examining how collaborative value emerges on the micro level revealed that the target beneficiaries function as the principle factor that underpins all value creating endeavours of the arts organisation. Rather than the collaborating organisations simply channelling value for target beneficiaries as promulgated in extant literature (Austin 2000; Selsky and Parker 2005; Yaziji and Doh 2009; Austin and Seitanidi 2014), the target beneficiaries co-create collaborative value by giving meaning to the existence of the arts organisation. Collaborative value is principled by their volition to participate (LeBer and Branzei 2010a). Accordingly, the arts context is characterised by the relational process of value creation. The social value proposition of the arts organisation is inherently entwined with the target beneficiaries' co-creative response (Boorsma 2006).

The study has shown that there are many other beneficiaries for whom the collaborative arrangement creates value, yet they are not the intended target beneficiary of the socially oriented collaboration. The co-creating stipulation in the arts may also be distinct from situations where beneficiaries are less involved. The environmental context, for example, offers many cases where partners join forces in order to eliminate a specific environmental issue for the benefits of society at large, rather than requiring individual target beneficiaries to actively engage in creating such social value. The case of Earthwatch and Rio Tinto reported by Seitanidi (2010), and other cases related to mining (Sullivan and Kiangi 2004) and oil companies' externalities (Sullivan and Warner 2004) are illustrative of this approach. Overall then, the study acknowledges the diverse role of beneficiaries, similar to the views of Coff (1999) and Le Ber and Branzei (2010a) that beneficiaries function differently depending on context. However, the input of distinct stakeholder groups needs to be determined.

Nonetheless, the internal positioning of the target beneficiary in the relational contexts has implications on the current understanding of whether collaboration creates outcomes that contribute to societal betterment. In the organisation-centric perspective, the difference between social and societal value is typically attributed to an explicit intent of the partnering organisations to address a specific social issue that is achieved through generating innovative solutions externalised to society (Seitanidi 2010). The co-created collaborative value is channelled to passive target beneficiaries. Accordingly, the CVC framework (Austin and Seitanidi 2014) posits value created on the target beneficiary level as external, societal outcomes.

However, integrating the beneficiary perspective into the organisational understanding underscored by the relational perspective in the arts context utilised in the thesis indicates an alternative perspective. Since the target beneficiary is a core member of the co-creation process, focusing solely on generating value on the target beneficiary level generates social value that remains within the collaboration boundaries, rather than on the macro level (Seitanidi 2010). The study suggests that in relational perspective, the distinguishing factor pertains to whether the social value co-created within the collaborative arrangement can be accessed directly by external constituencies and beyond the lifespan of the collaborative arrangement. Where collaboration embeds the cumulative social value generated in the collaboration in institutional structures in society, i.e. social value is

externalised, the access is enabled and the cumulative properties are secured by systemic changes that will perpetuate the socio-economic benefits in a virtuous circle (Waddock and Graves 1997). Although both social and societal value created in arts and business collaboration generate valuable outcomes for society, societal value contributes to sustainable societal betterment.

In order to explore the effect collaboration may have on society, it was decided to focus the thesis on transactional collaboration. Transactional collaboration is reported as the most commonly practiced form of collaboration both generally (Googins et al. 2007; Bowen et al. 2010) and in the arts (McNicholas 2004; Kim 2009). However, the scepticism related to the ability of collaboration to produce value for society beyond the organisations' interests is most heavily levied against transactional collaboration (Porter and Kramer 2006; Seitanidi 2010; Selsky and Parker 2010). The decision to examine transactional collaboration was based on the assumption that implicit in the collaboration phenomenon is the fact that supporting an NPO will improve its operations and, therefore, contributions to society are made (Austin 2000; McNicholas 2004). The greater the degree of contributions and co-operation between the collaboration organisations, the greater and more direct the societal value creation is (Austin 2000; Austin and Seitanidi 2014). As introduced at the close of chapter 2 and fully explained in sections 3.2.3 and 3.2.4, transactional collaboration is not necessarily a purely private gain in nature. It is characterised by two distinct approaches based on whether the predominant orientation is organisational or societal. The thesis suggests that both generate value for society, yet the societal oriented transactional hybrid has the capacity to directly produce unique social value that entails societal value potential, similar to the suggestions of Seitanidi and Ryan (2007: 253) that the motivation in socio-sponsorship is *"to meet social needs"* whilst expecting compensation rewards.

It is further suggested that the more complex value contributors through which transactional hybrids are structured enable the transactional collaborative arrangements to generate innovative social value (McNicholas 2004; Austin and Seitanidi 2014), such as the unique arts-based educational and training projects. As the findings demonstrate, it was the two collaborations that progressed closest to the integrative stages (Austin 2000) and the mission fit was most closely aligned (Berger et al. 2004; Le Ber and Branzei 2010b) that either co-created societal value or attempted to secure self-sustainability of the social value generated. This is similar to McNicholas' (2004: 61) views that through *"interrelatedness,*

complexity, pluralism, creativity and innovation, authenticity, congruence and values... features” the new age arts collaboration can foster innovation that deliver “unique opportunities and powerful economic advantages for business and communities” (ibid 2004: 58).

Even though transactional hybrids hold the potential to create societal value, its full realisation is typically contingent on wider network structures that develop around the phenomenon. Transactional collaboration, even when socially oriented, needs to deliver tangible compensation rewards for the business partner to continue. This makes its longevity unpredictable which may prevent the full realisation of societal value creation through a single dyadic relationship. This study suggests that arts organisations can however manage a portfolio of transactional relationships that can influence the impact on society, similar to the views of Chien et al. (2011: 142) that “the source of image transfer can be composite” and that of Kim (2009: 238) that arts organisations need to develop portfolios as part of “*an integral part of strategic planning*” to “*produce significant benefits for society*”. Even though transactional collaboration has a limited lifespan and can end abruptly, through portfolios the unique social value can be nurtured until an opportunity or sufficient organisational learning emerge within the arts organisation to externalise it by developing necessary supporting structures through changes in institutional/policy arrangements. Particularly for smaller NPOs, managing a portfolio of transactional relationships as opposed to focusing on developing a single dyadic evolving relationship can protect the arts organisation from becoming vulnerable, should the relationship end suddenly. The portfolio allows the arts organisation to secure an appropriate new relationship whilst remaining focused on its mission that has stimulated the cumulating social value.

The new relationships and indeed preventing existing relationships to end, relies to a large extent on the personal preferences of like-minded individuals who surround the specific social mission as explained in literature in section 3.2.5. Even though different sectoral affiliations indicate incongruous value frames of individuals at arts and business organisations, deeply held personal views are shown to transgress the ostensible worldviews imposed by distinct sectoral affiliations (Berger et al. 2006). The many individuals who remained personal supporters of the observed arts organisations beyond the lifespan of the collaboration, or were able to carry the arts organisation with them to

their new professional careers, demonstrate this. As commented by Ryan and Blois (2010) people are not robots that leave their identities at the door of the company.

The study suggests that multilevel individuals influence the ability of transactional collaboration to generate societal value. Decision makers in the position of power help establish collaboration and make the key decisions for the approach to it (Austin 2000; Frank and Geppert 2004). However, as the study demonstrates the long-term survival of collaboration and so the cumulative properties of social value require 'workforce fit' (Berger et al. 2004). The strategic emphasis on employee engagement requires employees buy-in to the relationship. The subsequent close multipoint relationships developed across the boundaries of the collaborative arrangements 'glues' the relationship together (Austin 2000) and strengthens its strategic importance to the organisation.

Even though transactional collaboration evidently generates value for society as principled by the above factors, it cannot be considered a sustainable vehicle for delivering social change. It is suggested that the structural and governance characteristics that make the societal value delivery more opportune than intentional, inhibit their role as a sustainability driver (Glasbergen 2007), similar to Seitanidi's (2010: 129) findings that in a partnership approach *"the lack of intent, strategy and assessment for the societal outcomes weaken the importance of the relationship... for society"*. The lack of these dimensions increases the power imbalance that leaves the contributions to societal betterment at the whim of business. Ashman (2001) previously suggested that issues with control and the partners' motivations can prevent the delivery of social good. Nevertheless, until more sustainable governance mechanisms such as social partnerships or social enterprises become commonplace in society, transactional collaboration offers an alternative route to contributing to societal betterment. How it manifests will be discussed next.

9.2.2 Manifestations of societal value creation

Societal value creation through transactional collaboration is given expression through the different magnitude of value that collaboration generates as was shown in sections 3.2, 3.3, 4.4 and 4.5 of the literature review. This pertains both to value modality that includes transient and cumulative value, and classes of value manifested as social value

and societal value. The study suggests that the modality of value is informed through the nuanced links between different types of benefits and the value added, and the aptitude of the distinct benefits produced to transmit across the micro, meso and macro levels as explained in sections 3.3.4 and 3.4.1. As the empirical evidence shows, some businesses utilise arts collaboration for staff development. By attending various creative training programmes, the individual employees benefit through a variety of personal benefits. These then trickle to the meso level in that the arts and business organisation gain tangible and intangible organisational benefits (Kolk et al. 2010; Vock et al. 2011).

As reported in literature, new skills acquired by the employees can enhance overall performance and the sense of recognition is likely to lead to improved staff retention (Bhattacharya et al. 2008; Kolk et al. 2010). On the macro level, the community arts organisation continues to provide benefits to the local community through its mission, the corporation is stable and the individual accrues self-fulfilment. The social capital is enhanced not only through well-rounded individuals and improved relationships, but also in terms of enriched provision in the locality (Şişmanyazici-Navaie 2004; Brown 2006). Findings here are, therefore, similar to the views of Kolk et al. (2010) that trickle effects can transmit value within and across levels of analysis. Likewise, the findings of Vock et al. (2011) that *“psychological mechanisms... might cause spillover effects of partnership from employees to customers”* has been observed and their findings are extended in that these effects are observable in transactional relationships across multiple individual groups. Positive attitude transfer was evident following engagement in the collaboration related activities from the target beneficiaries to their social and professional networks. In addition, the norms of reciprocity were observed as the value transmission mechanism (Blau 1964; Molm et al. 2007).

The move towards self-actualisation and feelings of personal satisfaction acquired by the individual as a reward from engaging in the collaborative arrangements was shown to stimulate continuing commitment to the particular organisation. This is similar to the findings of Drumwright (1996) showing that these people adopt a role of the “evangelist” and advocate the organisations involved, as well as the cause itself.

The study further suggests that the macro level value links closely with the value created at the micro level, and so contributes some initial empirical evidence to Kolk et al.’s (2010: 134) theorising that positive micro level value *“may extend to the meso and macro*

levels as well” and as such the multiple benefits place collaboration as “agents of change”. The personal and professional growth experienced by the ‘ultimate’ trainee of IMS that she acquired through the relationships with the key corporate partner evidently ‘trickled’ across to the meso level through her active involvement in enhancing the collaborative outcomes for both partners. It also transferred to the macro level by mentoring apprentices coming through the re-established creative apprenticeship provision in Wales. In a virtuous circle (Waddock and Graves 1997), the skills accumulated by the apprentices subsequently functioned as benefits for other creative organisations and also contributed to improved creative provisions. The enhanced creativity and creative provisions benefit broad constituencies, denoting societal betterment (Austin and Seitanidi 2014).

In addition, explicating the differences between episodic and cached benefits and how they arise has provided an understanding of the ‘transitory and enduring benefits’ alluded to by Austin and Seitanidi (2014). Positioning the episodic and cached benefits as distinct operands of value creation has helped to conceptualise the value modality, consisting of transient and cumulative value. The distinction in the magnitude of positive effect on society, both economic and social, is similar to Weber’s (2008) views that benefits from CSR have a tangible effect on a company’s profitability, whereas qualitative benefits result from contributions to the long-term competitiveness and economic success of the firm. Gourville and Rangan’s (2004) framework also considers the magnitude of impact in relation to time horizon as first and second order benefits. The time dimension, both in terms of velocity and endurability of the advantage accrued, informs the sustainable properties of the value created, and so the capacity to induce change in society.

The study suggests that transient value consists of ‘episodes’ which provide immediate gratification directly linked to the action that stimulated the value emergence. The dependence on the stimulant shows that transient value lacks self-sustenance and the advantage expires promptly (Brown 2006). Cumulative value is shown to function through cached benefits that require time and effort to mature, yet the value mode is enduring. Cumulative value moves towards transforming where appropriate self-sustaining structures are implemented beyond the formative collaborative elements. The findings demonstrate that cumulative value can emerge through both sole creation and the co-creation of value, although the aptitude to contribute to societal value creation increases with the complexity of exchanges. These findings correspond with Seitanidi’s (2010) conceptualisation of

collaboration outcomes that form organisational outcomes and social outcomes. The understanding of the distinction between social and societal outcomes however differs.

This study proposes that the sustainability of the cumulative value pertaining both to the organisational and social outcomes is mediated by the development of supporting structures within the societal order (Googins et al. 2007; Austin and Seitanidi 2014). Where these are existent or developing, cumulative value is created on the macro level. Failing to develop the supporting structures, beyond serendipitous occasions, the virtuous circle is interrupted. This class of cumulative value is social because it is generated inside the collaborative action and to continue accumulating, it depends on ongoing co-operation within the collaborative arrangements. It cannot be considered as societal as it does not offer direct benefits to actors outside the collaborative action and its effect beyond the collaboration ending is uncertain. Where the collaborative action secures the co-created cumulative social value through establishing appropriate supporting structures in society, all organisations and individuals that were involved in the collaborative action, as well as the wider society, continue to receive benefits from the perpetuating value that has become part of the societal make-up (Googins et al. 2007). This is the fundamental difference between social and societal value generated through collaboration between community arts organisations and business.

This study further suggests that to transform the societal value potential (internal social value) to sustainable societal value requires broad collaboration within and across all sectors, similar to the views of Googins et al. (2007) and Austin and Seitanidi (2014). Ensuring sustainability of the societal value created was achieved by securing co-operation from the public sector, as well as other nonprofit and private sector organisations. Although it remains rare, through securing multi-sector collaboration, significant improvements in the well-being of wider society can be realised. The discussion has so far attributed much of the effort to induce societal betterment to the work of the arts organisation and the target beneficiaries. The process of generating societal value is however heavily influenced by the approach adopted by the business, as can be inferred from the distinct approaches to transactional collaboration discussed above. The different functions will be briefly discussed next.

9.2.3. Functions of the business partner

The study has provided rich insights into the functions of the business partners in transactional collaboration. The observed differences in the degree to which the business partner was interested and/or engaged in generating social value are consistent with extant literature that distinguishes between a number of levels of integration of collaboration to business strategy (Austin 2000; McNicholas 2004; Porter and Kramer 2006, 2011; Googins et al. 2007; Kim 2009; Weinstein 2010). This literature distinguishes the business partners who were satisfied by merely co-creating social benefits, without perceiving it their role to help ensure the created social benefits were sustainable, from those who either actively partook in developing the supporting structures or were proactive in searching for such solutions. The role of the business partner is twofold based on the level of direct engagement in creating social benefits: a social value facilitator assists the arts partner in fulfilling its mission, and a social value provider, where the business partner directly partakes in the process of creating socially infused benefits by merging the distinct resources, skills and capabilities with the arts partner.

Both roles carry the potential to produce cumulative value. The difference stems from the level of integration of social objectives in the business partner's collaborative strategy. Although it remains rare, the business partner may incorporate social objectives as part of the collaboration aims and participate directly in producing social benefits as was observed both in the case study and in the subsequent interviews.

The partners combined their unique resources to create innovative solutions to improving the conditions within the creative industries, particularly in terms of improving inclusivity. This essentially separates the arts supporters into those with an instrumental orientation to CSR responsiveness and those progressing towards CSR cultural embedment (Zadek 2004; Maon et al. 2010). However, the findings further support the conceptualisation of Maon et al. (2010) that cultural embedment consists of further stages of maturity. The study, therefore, suggests that the engagement in generating societal value ranges from little interest in ensuring its longevity through to a proactive approach to finding solutions to secure sustainability and finally co-creating the social benefits as part of partaking in establishing supporting structures that sustain the social value over time.

The final proposition of the thesis extends a continuum of the functions of the business partner in societal value creation. One extreme end is occupied by social value facilitators characterised by self-interested motives where social objectives are the prerogative of the arts partner. The opposing side shows business partners that contribute to developing systemic changes that sustain the co-created social benefits. The study further suggests that a positive collaboration experience may not only ensure that the business partner remains in the role of a benefits facilitator, but it may also encourage the senior executives to identify avenues to further its role as a direct social benefits provider, similar to Austin's (2000) suggestion that collaboration that proves its worth to the business partner is likely to be renewed and engagement deepened.

9.3 Contributions

The contributions of the thesis can be grouped into three categories: academic, managerial and policy implications.

9.3.1 Academic

New knowledge was contributed through the creation of a conceptual framework that informs as to the principles and manifestations of societal value creation through transactional collaboration between nonprofit arts and business organisations. It also clarifies the functions of the business partners in producing sustainable societal value as a rudiment of societal betterment. The key contributions to extant knowledge can be summarised as follows:

1. The integration of beneficiary perspective to reflect the relational principal of artistic value generation provides a complementary view to extant literature that sees the creation of the alliance as the origin of collaborative value creation. Without the co-creative response of arts organisations' target beneficiaries as theorised in chapter 4, no collaborative value creation can occur. Fundamentally, the arts organisations would have no legitimate reason to exist, and so there would be no collaboration. As co-creators of collaborative value, value generated at this level cannot be considered as an outcome

delivered externally. The value is internal and elemental. It gives expression to other forms of micro and meso level value directly generated by the collaborative arrangements.

Through trickle effects the social value generated on the micro level continues to cumulate and is enriched through the unique collaborative arrangements. It may indirectly benefit individuals, organisations and communities on the macro level, yet the indirect effects are transient and rely on continual renewal by the collaborative arrangements. Although a unique form of social value is generated and entails societal value potential, it only directly benefits constituents within the collaborative arrangements.

Consequently, collaboration that only generates social value at the target beneficiary level cannot claim direct contributions to sustainable societal betterment. Contributing directly to societal betterment requires ensuring that the unique social value generated can be accessed by external constituents through systemic changes in the institutional arrangements. The difference between social and societal value, therefore, not only rests on an 'intent' to address a specific social problem through a co-creative 'strategy' (Seitanidi 2010: 129) as informed by the organisational perspective, but also on the value creation modality of the social context as derived from the beneficiary perspective. The conceptualisation of value modality can be considered complementary to the loci, excellentia and distinctus categories of the CVC framework by Austin and Seitanidi (2014).

The thesis, therefore, meets the broad objective that set out to *"define the relational/contextual dynamics through which societal betterment is given expression/is untapped through collaboration in the arts context"*. The specific objectives that looked to provide: *"a detailed account of the interaction processes through which value for society is generated in transactional collaboration in the community arts context, through the lens of a combined organisational and beneficiary-centric standpoints"*; and to *"articulate the nuances of value that benefits the wider society as generated through transactional collaboration..."* have been addressed. Their more nuanced expression will be detailed as part of the following contributions.

2. Moving beyond the mainstream theorising that the expression of societal value creation through collaboration is contingent on a single dyadic relationship beyond transactional approaches, the thesis has demonstrated that contributions to sustainable societal betterment can be induced through transactional collaboration under specific conditions. Transactional collaboration in the arts is shown to be given expression through

two distinct relationship approaches: traditional and hybrid. As long as the transactional collaboration entails advanced value creation contributors of transactional hybrids, the possibility to generate societal value through transactional collaboration increases. This enables the effective pooling of distinct resources and more complex interactions that stimulate the innovation required for societal value potential to materialise. What gives expression to sustainable societal value creation that directly contributes to societal betterment in transactional collaboration is the management of a portfolio of transactional relationships, parallel and/or consecutive. An appropriate level of organisational learning and fit to integrate a transactional hybrid approach enables the portfolio to generate societal value. Managing a portfolio further means that the cumulating social value can be enriched through the distinct resources and expertise of the different relationships. It also safeguards the cumulating societal value potential through the possibility to substitute an unexpected loss of a relationship.

Even if only temporary, it gives the arts organisation a chance to secure an appropriate new relationship whilst remaining focused on the mission that has enabled the value to cumulate. The new relationships rely to a large extent on the personal preferences of multiple individuals who surround the phenomenon. These contributions satisfy the intentions of the next objectives: *“to provide a detailed account of the approaches to transactional collaboration through which societal betterment emerges”* and *“to provide a detailed account of how societal betterment emerges through managing a portfolio of transactional relationships by a community arts organisation”*.

3. The processual single case study approach is recommended as a useful approach for the type of enquiry the thesis set out to examine. However, existing cases typically focus on analysing a specific relationship dyad or a set of dyads. Utilising a case study that narrates the overall collaborative efforts of a central arts organisation has resulted in novel and important insights into societal value creation through collaboration with business. Important characteristics and conditions that drive the ability of societal value to create transactional collaboration have been derived. Moreover, study design has given voice to multiple stakeholders that surround the phenomenon of arts and business collaboration. The findings and contributions have been developed by building on the compounded perceptions of individuals that engage in the process of societal value creation and benefit from it, therefore, satisfying the final objectives of the study: *“to convey the meaning of*

collaborative value for society as perceived by the different stakeholders of hybrid transactional relationships between community arts organisations and for profit organisations”.

9.3.2 Managerial

The central contribution of this research to managers involved in collaboration is an increased understanding of how the counterparts perceive the processes and outcomes of value creation. Managers need to be aware of the time delay particularly in relation to the cumulative value operands and the level of complexity associated with transforming these benefits into cumulative value that can induce social change.

Despite the perceived complexity, business managers need to consider the threats associated with approaches to collaboration that may be perceived by the public as exploitative. In today's society, where technological improvements enable open access to different sources, claiming societal improvements where the actual impact is ambiguous may result in a backlash from both internal and external stakeholders. Beyond the organisational impacts, most business managers thought little about the sustainability of the social value they helped to create, despite the collaborations using different forms of CSR. This research will help business managers to extend their understanding of how the different approaches function in improving society and so help them justify the current practice, but also enhance awareness and improve the ability to rationalise the greater implementation of social objectives and more complex collaborative practices into corporate strategy.

The arts managers require a more rounded understanding of the corporate objectives, particularly in cases where the business partner expresses an interest in taking an active role in creating social benefits. A number of the arts managers stated that they were unsure of the partner's objectives and felt unable to 'ask' in fear of losing the financial support. This research will help arts managers to better understand their fundamental role in the process and outcomes of value creation. It moves beyond evaluating the social outputs in the form of visitor numbers and various socio-economic characteristics, towards developing qualitative evidence that will provide a clearer understanding of the outcomes

and potential impacts of both their inherent activity and that related to the joining forces with the private sector. This explicates the impacts of the artistic activity on individuals and its instrumental role in addressing social issues and helps to develop an understanding of how community arts organisation add value to society. Once this is internalised, the arts managers will be able to begin reclaiming the status of an equal partner capable of an open discussion and negotiation of mutually beneficial relationships. This move will also provide the much needed evidence of the value of the arts to society that can be used in lobbying the policy makers in the UK who decide on future funding of the arts and avert the current emphasis on justifying the arts through economic measures.

Arts managers need to be aware that the impact their organisations have on society is an outcome of a portfolio of relationships and so all require careful management. Incorporating new partners must be contingent on pursuing the same social aim. Moreover, the attainment of cumulative societal value requires the co-operation of the actors from the public sector. Where systemic change was delivered, this was indeed the outcome of a co-operation of a wide range of organisations from across all societal sectors. Further managerial implication, therefore, relates to the developing notion in the cross-sector literature that transformative outcomes require multiparty collaboration across all sectors due to the complexity and embedment of social issues in society (Selsky and Parker 2005, 2011; Mirvis and Googins 2006; Mirvis et al. 2007; Austin and Seitanidi 2014).

9.3.3 Policy Implications

The thesis may contribute to future policy development as follows. The key question raised by the thesis is the impact of arts and business interactions on broader public interest. The findings demonstrate that arts and business interactions provide benefits on an individual, community and national level. Since policy assumes that making decisions can shape public interests, the public stake in the phenomenon outlined in the study has relevance to future government policy. This study demonstrates that greater public good is generated once the organisations move beyond the traditional philanthropy of donations. However, as currently only donations are tax deductible, sponsorship is considered a marketing related endeavour (Andersen 2000). Socio-sponsorship and other hybrid

relationships may entail compensation rewards, yet the primary aim is socially oriented (Seitanidi 1999, cited in Seitanidi and Ryan 2007).

As the thesis shows, transactional collaboration between the nonprofit arts and for profit business sector can contribute significantly to public good. The current legislation excludes these forms of interactions from tax incentives in favour of charitable donations that have been shown to carry less potential for socio-economic value outcomes. This issue is an area that government policy focusing on supporting arts supply can address. Indeed, in the view of the continued public funding cuts to the arts (ACE 2011; ADUK 2011; Osborne 2014) and the ubiquitous governmental encouragement for increased private sector involvement with the arts (DCMS 2011), expanding the demarcation of the tax exemptions rule may encourage interest from “those not won over to the arts” (Rentschler 2002: 53).

The observations also point to implications for policy makers dealing with the arts demands that focus on improving the access and exposure of individual to the arts. Insofar that the arts are considered a public good, the arts are shown to be contingent on initiating and sustaining participation in the arts (McCarthy et al. 2001). However, the conversations with different arts managers indicate that the perceptions that the arts are reserved for the upper societal echelons in the UK remain. The thesis illustrates innovative avenues for more inclusive participation in the arts. These were enabled by the collaborating partners working with schools and other community institutions in areas that would not typically have access to opportunities to experience the arts. Public policy makers may wish to consider providing such opportunities as part of, for example, the education policy. Including such projects as part of the educational curriculum or ethnic minority inclusivity policies would introduce atypical market segments to the benefits associated with the arts and, therefore, indirectly stimulate future demand from a wider spectrum of social backgrounds. This may indeed counteract the dwindling arts audiences (Hobday 2002; Weinstein 2010), and promote the self-sustainability of arts organisations.

9.4 Limitations

The study does not claim universal generalisability. It is informed by paradigmatic views that impede such a suggestion, but principally, the conceptualisation is constructed

through the personal interpretation of a very specific section of social life informed by purposively sampled informants. Only a very narrow area of the complex and multifaceted societal phenomenon in the form of value creation from largely transactional forms of collaboration between arts organisations and businesses was examined. Rather, the aim is to contribute to theory building by providing insights characterised by thick descriptions of the actions, events and processes as observed and understood in the field and interpreted in light of extant academic thinking. These are communicated through the dimensions and propositions that structure the conceptual framework.

Moreover, as was discussed at the outset of the thesis in the section ‘defining key terms’, the understanding of societal value creation through arts and business collaboration as presented in the thesis is constructed and delimited to the nonprofit community arts context. The commercial orientation of for profit arts organisations and the aesthetic emphasis of professional arts organisations may entail divergent collaboration motives. The lack of the social motive (McCarthy et al. 2001) or missing the developmental emphasis (Şişmanyazici-Navaie 2004), respectively, may significantly influence whether and how societal value emerges (DiMaggio 1987). In addition, the internal context of the arts organisations examined in the thesis is largely associated with the performing arts as defined by McCarthy et al. (2001), introduced in chapter 1. The interactional nature of performing arts (Sicca 2000; Kern 2006) means that this artform is particularly suited in instances where arts become a developmental tool (DiMaggio 1987; Milner 2002; Şişmanyazici-Navaie 2004).

The framework presented is delimited primarily to internal context that entails nonprofit, community and performing arts organisational characteristics (Stake 1995; Pettigrew 1997). However, it offers useful insights for arts organisations operating within different internal contexts. In light of the postmodern relational turn in determining artistic value (Boorsma 2006), the principle that positions target beneficiaries as integral constituents of collaborative value creation for society can be utilised by both commercial and nonprofit high arts organisations in developing appropriate value propositions; this is crucial for survival in the new arts administration paradigm (Weinstein 2010). The relational view considers all arts as a product of social interaction, rather than it being “a self-contained phenomenon... defined on the basis of intrinsic properties” (Boorsma 2006: 75). Instead of positioning purely as a status symbol providing hedonistic benefits when

developing value offering in seeking collaborators , these organisations can utilise the functional benefits of engaging with high arts to include improved critical thinking dispositions (Lampert 2006) and imagination and creativity in solving unconventional problems (c.f. Darso 2004).

In light of Pettigrew's (1997) suggestions that the inner organisational context as well as the external forces impact on the organisational level processes and, inevitably its outcomes, the outer context delimits the findings to relationships between nonprofit community arts organisations and large for profit business in the UK, with the basis of the framework developed specifically within the Welsh context. As is discussed in the methodology chapter, the Welsh context is highly conducive to arts and business collaboration due to favourable policy aimed at creative industries development. Some of the macro environmental factors that gave rise to the societal value creation may be missing elsewhere. However, the need to diversify income by developing relationships with businesses (Kim 2009; Weinstein 2010; DCMS 2011) is reported across the developed Western world (e.g. Hobday 2002; Rentschler et al. 2002; Roppo and Sauer 2003; McNicholas 2004; Bussell and Forbes 2006; Swanson and Davies 2006; Kim 2009). The framework, therefore, offers a basis for cross-cultural examination of value outcomes for society in arts and business collaboration.

In addition, the thesis focused specifically on arts and business societal value creation endeavours. However, the cumulative value that resulted in societal value generation was created with the help of various intra-sector and cross-sector partners. In addition to large businesses, the case study shows that SMEs and a variety of non-commercial entities form part of the network of relationships developed by IMS. However, due to the previously outlined differences in motives and execution between SMEs and large business (section 1.4.2.1); and the distinct voluntary character, social over commercial context, internal direction of pressure and its accountability to public rather than private interest of the non-commercial entities reported in literature (Seitanidi 2005; Clements and Bowrey 2010; Watters and Ott 2014), the focus here is predominantly on the large business segment. This forms a major limitation of the thesis.

In terms of the methodological limitations, the study attempts to contribute to theoretical knowledge of how this specific form of arts and business collaboration contributes to developing sustainable social welfare. The thesis builds on the views of

numerous groups of stakeholders directly through interviews with the arts and business partners managers, the artists, the end beneficiaries, the employees and a consultancy that operates within this context. The thesis then incorporates insights gained through observation of events and documentary analysis, where in addition to the stakeholder groups engaged in the interviews, public sector figures participated, including for example the Welsh First Minister and the Head of BBC Wales. However, these leaders were not interviewed directly and the lack of direct insight about the societal benefits from the public sector leaders needs to be acknowledged as it presents a limitation to the societal value proposition.

9.5 Future research

The process of constructing this study has revealed a number of areas that substantiate further research. The study conceptualises target beneficiaries as co-creators of collaborative value in relational contexts. Their role is distinct from other individuals within the collaborative arrangement that acquire benefits. Consequently, value generated at the target beneficiary level needs to be considered as a distinct, internal collaborative value category, rather than being a part of nested outcomes of the interconnected levels of analysis. Whether and how this may apply beyond the relational context is an area that critical research in particular could examine.

Moreover, a proposition is made that in transactional collaboration, a portfolio of relationship can substitute the need for a central dyadic relationship evolving over time as a way of generating sustainable societal value. Future research avenues could determine whether this is the case for different structural arrangements in arts and business collaboration, as well as in NPO-business collaboration in context others than the arts.

In addition, the thesis indicates that sustainable societal betterment requires collaboration across all three societal sectors as achieving systemic changes typically involves legislative powers (Googins et al. 2007). Therefore, a holistic picture of cumulative societal value creation in NPO-business collaboration that induces sustainable value for society requires incorporation of the public sector perceptions. Focusing on tri-partite

collaboration (c.f. Selsky and Parker 2005) as a unit of analysis is likely to prove instructive in future research.

The limitations related to the sole focus on large businesses at the expense of SMEs offer substantial research areas for scholars interested in the management of this specific organisational segment. Extant research on SME involvement in CSR suggests that there are significant differences in the approach to understanding and implementing social responsibility (e.g. Jenkins 2006). The motivations and approaches to SME collaboration with NPOs are likely to differ, just as is the approach that NPOs utilise when engaging SMEs. Examination of this niche field may provide insights that the current large business centric focus overlooks.

Similarly, the case study indicates that organisations outside the private sector nowadays engage in CSR to deal with the increasing pressures on demonstrating greater accountability. The principles for adopting CSR differ between the sectors and so they are likely to lead to divergent focus. As the case study indicates however, the strategies can overlap leading to the engagement of cross-sector organisations' in the same programme. This was the case when BBC Wales as a public sector organisation took over the role of the principal partner from profit ITV Wales. BBC Wales was evidently motivated by a CSR strategy. Seitanidi's (2005) work on CSR in the non-commercial sector, and specifically Ward (2004) and Clements and Bowrey (2010) on the incorporate of CSR reporting in the public sector offer initial insights into how this avenue can be further explored. In addition, Watters and Ott's (2014) seminal study on the relevance of CSR as an organisational concept in the nonprofit sector shows a latent research area. Since CSR is a driver of complex collaboration for business, it would be particularly insightful to learn whether and how this works in reverse.

The study further finds that powerful networks made of individuals from a variety of sectoral and industry backgrounds develop as a response to negative developments both within the arts and wider society. These individuals share a deep appreciation and knowledge of the developmental role of the arts. These networks act as the impetus behind the formation of collaboration (Austin 2000; Roppo and Sauer 2003) and also as a phenomenon that leads to the generation of value capable of systemic changes.

These networks are similar to Waddock's (2008) views that the convergence of individual personal values between social and institutional entrepreneurs as influenced by macro environmental developments gave rise to the corporate responsibility movement. Building on these findings, future research may utilise Actor Network Theory (Lee and Hassard 1999; Latour 2005) as a research strategy to advance this proposition. Actor Network Theory offers an approach in which "human and non-human, social and technical factors are brought together in the same analytical view... to make sense of complex social situations" (Hassard et al. 1999: 388). This offers a constructive approach to delineating the factors that induce positive and negative systemic social change.

This study is also concerned with perceptions related to positive impacts on society. However, there are some indications, particularly on the arts side, that arts and business collaboration may contribute towards a decrease in public funding, denoting a negative implication. Public policy research, specifically in arts administration, is best placed to track the purported negative correlations.

Lastly, the issues of generalisability can be overcome by replicating the study in other organisations, particularly in a different context, but also cross-culturally. The findings here show that personal values are a factor that influences societal value creation (e.g. Daellenbach et al. 2013). Schwartz et al. (2001) show that human values are influenced by the political, economic and social environment of the individual, cross-cultural understanding and this is justified in constructing a broad understanding of societal value creation through the collaboration between NPOs and for profit business.

9.6 Coda and closing thought

The study has answered its primary aim to contribute to a better understanding of how arts and business organisations create value for society through collaboration. This extends to both academic understanding by extending the literature related to this research area and to practice, where many of the interview participants have asked for a copy of the findings and my ongoing relationship with the case study organisation. Since the completion of this study, new relationships between the previously unconnected partners have developed.

The research process as presented in the thesis may portray a picture in the reader's mind of a research process that is linear and carefully crafted to arrive at a 'trustworthy' conceptual framework. In theory, it should be. However, praxis again showed me that the articulation of how I developed the research problem to the 'finale' is anything but linear. The experience of conducting this study mirrors the views of those who impugn the linearity incumbent in textbooks and see the nature of academic research as 'out-of-order' and 'messy' at times.

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APPENDICES

Appendix 1: Meso level benefits studies

Meso level benefits in NPO-business collaborations (to include building the business case for CSR/CCI/sustainability studies)			
	context	NPOs	Business
general CSR studies – business case			
Turban, D. B. and Greening, D. W. 1997. Corporate social performance and organisational attractiveness to prospective employees. <i>Academy of Management Journal</i> 40(3), pp. 658–672.	CSP, general, empirical study	not addressed	- increased company attractiveness to potential employees - increased reputation
Steger, U., Ionescu-Somers, A. and Salzmann, O. 2007. The economic foundations of corporate sustainability. <i>Corporate Governance</i> 7 (2), pp. 162–177.	corporate sustainability, environmental and social issues, global, empirical study	not addressed	- cost reductions - improved risk management - better licence to operate - enhanced brand value and reputation - better attraction and retention of talent
Weber, M. 2008. The business case for corporate social responsibility: a company-level measurement approach for CSR. <i>European Management Journal</i> 26, pp. 247–261.	building the business case – synthesis of theoretical and empirical CSR and CS studies	not addressed	monetary: - quantitative: <ul style="list-style-type: none"> • revenue increases • cost decreases • risk reduction • increase in brand value non-monetary: - quantitative: <ul style="list-style-type: none"> • improved customer attraction, retention • improved reputation • improved employee recruitment, motivation, retention - qualitative: <ul style="list-style-type: none"> • improved access to capital • secured license to operate
Haanaes, K., Arthur, D., Balagopal, B. et al.	corporate sustainability, global	not addressed	- improved brand reputation

2011. <i>Sustainability: The “embracers” seize advantage. Research Report</i> . North Hollywood, USA: MIT Sloan Management Review 52 (3), pp. 1–27	executive study		<ul style="list-style-type: none"> - increased competitive advantage - access to new markets - increased margins or market share due to sustainability positioning - reduced costs due to energy efficiency - better innovations of business models and processes - better innovation of product, service offerings - improved perception of how well the company is managed - reduced cost due to materials or waste efficiencies - improved regulatory compliance - improved ability to attract and retain top talent - enhanced stakeholder/investor relations - reduced risks - increased employee productivity
CCI studies – business case			
Rochlin, S. and Christoffer, B. 2000. <i>Making the business case: Determining the value of corporate community involvement</i> . Boston, USA: The Centre for Corporate Citizenship.	CCI – synthesis of theoretical and empirical studies	not addressed	Enhancement of: <ul style="list-style-type: none"> - corporate licence or freedom to operate - customer relations and attracting/marketing - human resources - innovation in marketing and product development - reputational capital - financial performance - social investment
Muthuri, J. N., Chapple, W., and Moon, J. 2009. An integrated approach to implementing community participation in corporate community involvement: Lessons from Magadi Soda Company in Kenya. <i>Journal of Business Ethics</i> 85 (2), pp. 431–444.	CCI, developmental, Kenya, empirical study	not addressed	<ul style="list-style-type: none"> - healthy business environment - competitive advantage - social legitimacy - licence to operate
Liu, G., Eng, T-Y, and Ko, W-W. 2012. Strategic	CCI, general theoretical study	not addressed	strategic directions:

direction of corporate community involvement. <i>Journal of Business Ethics</i> [online] DOI 10.1007/s10551-012-1418-z.			<ul style="list-style-type: none"> - organisational awareness - organisational acceptance - organisational accountability - network accessibility - network collaboration and loyalty - community interaction and rapport - community cohesion
NPO-business alliances studies – general context (to include all types and stages of alliances)			
Varadarajan, P. R. and Menon A. 1988. Cause-related marketing: a co-alignment of marketing strategy and corporate philanthropy. <i>Journal of Marketing</i> 52, pp. 58–74.	cause-related marketing, general theoretical study	<ul style="list-style-type: none"> - stimulating revenue-producing exchanges - generating greater awareness of the cause, mission and activities - promoting direct contributions from individuals and retailers - expanding volunteer pool 	<ul style="list-style-type: none"> - gaining national visibility - enhancing corporate image - thwarting negative publicity - pacifying customer groups - generating incremental sales - promoting repeat purchases - promoting multiple unit purchases - promoting more varied usage - increasing brand awareness - increasing brand recognition - enhancing brand image - reinforcing brand image - broadening customer base - reaching new market segments and geographic markets - increasing level of merchandising activity for the brand
Waddell, S. 2000. Complementary resources: The win-win rationale for partnership with NGOs. In: Bendell, J. (ed.). 2000. <i>Terms of Endearment: Business, NGOs and sustainable development</i> , Sheffield, UK: Greenleaf Publishing.	business and NGO partnerships, development, synthesis of prior research	not addressed	<ul style="list-style-type: none"> - risk management and reduction - cost reduction and productivity gains - new product development - new market development - human resource development - production gain organising

			<ul style="list-style-type: none"> - building barriers to entry – competitive advantage - creative and change – innovation
Nelson, J. and Zadek, S. 2000. <i>Partnership alchemy: New social partnership in Europe</i> . Copenhagen, Denmark: The Copenhagen Centre	social partnerships - general overview – European context	same as business	<ul style="list-style-type: none"> - development of human capital - improved operational efficiency - organisational innovation - increased access to resources - better access to information - more effective products and services - enhanced reputation - creation of a stable society
Gourville, J.T. and Rangan, V. K. 2004. Valuing the cause marketing relationship. <i>California Management Review</i> 17(1), pp. 38–57.	cause related marketing relationship – general context – theoretical study	<ul style="list-style-type: none"> - increased fundraising and support - behaviour change – raising awareness of the cause/social issue 	<p>positive influence on:</p> <ul style="list-style-type: none"> - current and potential consumers – sales effectiveness = increase in profits - company employees and investors – recruitment and retention of employees and investors = decrease in personnel costs - the general public – good corporate citizen – improve relations with the general public, local interest groups, government regulators = decrease in cost of public relations
Porter, M.E. and Kramer, M.R. 2002. The competitive advantage of corporate philanthropy. <i>Harvard Business Review</i> 80 (12), pp. 56–68.	corporate philanthropy, general theoretical study		<ul style="list-style-type: none"> - competitive advantage - improved competitive and operating context improved: <ul style="list-style-type: none"> - factor conditions – availability of high quality specialised inputs such as human and other resources, etc.; - context for strategy and rivalry - demand conditions - related and supporting industries
Rondinelli, D.A. and London T. 2003. How	cross-sector	(Low intensity)	(low intensity)

<p>corporations and environmental groups cooperate: assessing cross-sector alliances and collaborations. <i>Academy of Management Executive</i> 17 (1), pp. 61–76.</p>	<p>collaboration – environmental global context – empirical study</p>	<p>arm's length alliance:</p> <ul style="list-style-type: none"> - Obtain greater visibility for programs - Tap new sources of funding - Recruit new volunteers and participants <p>corporate contributions and gifts:</p> <ul style="list-style-type: none"> - Acquire new sources of funding - Obtain publicity for environmental programs <p>marketing affiliations:</p> <ul style="list-style-type: none"> - Acquire new sources of income - Enhance visibility - Endorse environmentally friendly products - Strengthen market for "green" products <p>Interactive Collaborations (Moderate Intensity):</p> <ul style="list-style-type: none"> - NPO certification of corporate business practices - Obtain external certification of environmental practices - Offer "green" products - Develop image of social responsibility - Prevent boycotts and protests - Targeted project support - Obtain additional sources of revenue - Publicise high-priority projects - Obtain equipment and services - Expand activities in specific projects - Enhance ability to raise project-specific funding - Environmental awareness and educational collaborations - Expand research on environmental issues - Influence business leaders' thinking on environmental issues - Engage in training and educational functions 	<p>arm's length alliance:</p> <ul style="list-style-type: none"> - Improve employee morale - Develop image of social responsibility - Enhance community relationships <p>corporate contributions and gifts:</p> <ul style="list-style-type: none"> - Support favoured environmental organisations - Develop image of social responsibility - Cultivate potential allies in environmental community <p>marketing affiliations:</p> <ul style="list-style-type: none"> - Endorsement from environmental groups - Add social value to products - Develop image of social responsibility <p>Interactive Collaborations (Moderate Intensity)</p> <ul style="list-style-type: none"> - NPO certification of corporate business practices <ul style="list-style-type: none"> • Certify sustainability of sources of natural resources • Change corporate raw materials procurement or purchasing practices • Help environmentally responsible resource owners expand markets for their products - Targeted project support <ul style="list-style-type: none"> • Focus corporate contributions on specific environmental activities or project locations • Develop medium- to long-term philanthropic relationships • Enhance image of social responsibility - Environmental awareness and educational collaborations <ul style="list-style-type: none"> • Ability to access and disseminate
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		<ul style="list-style-type: none"> - Influence public policy on environmental protection <p>Intensive Environmental Management Alliances (High Intensity)</p> <ul style="list-style-type: none"> - Achieve environmental goals and objectives - Learn how corporations deal with environmental issues - Influence changes in corporate management practices - Help prevent environmental pollution and degradation - Tap expertise and resources of corporations 	<p>environmental information</p> <ul style="list-style-type: none"> • Networking opportunities • Support research on new environmental approaches • Disseminate performance results <p>Intensive Environmental Management Alliances (High Intensity)</p> <ul style="list-style-type: none"> - Obtain access to environmental expertise - Diversity perspectives on environmental problems - Enhance profitability - Obtain external endorsement of environmental solutions - Achieve favourable publicity for partnering efforts
Walliser, B. 2003. An international review of sponsorship research: extension and update. <i>International Journal of Advertising</i> 22, pp. 5–40.	sponsorship, general overview, synthesis of theoretical and empirical studies	not addressed	<ul style="list-style-type: none"> - enhancing licence to operate via CSR - corporate hospitality - media coverage and publicity - improving employees morale - increasing company/brand awareness - enhancing company/brand image
Lev, B. I, Petrovits, C. and Radhakrishnan, S. 2008. Is Doing Good Good for You? How Corporate Charitable Contributions Enhance Revenue Growth (September 1, 2008). Available at SSRN: http://ssrn.com/abstract=920502 [accessed: 27 January 2012]	corporate giving, general, USA, empirical study	not addressed	<ul style="list-style-type: none"> - enhancement of future revenue growth
Peloza, J. and Falkenberg, L. 2009. The role of collaboration in achieving corporate social responsibility objectives. <i>California</i>	CSR collaboration (business-NGO),	not addressed	<ul style="list-style-type: none"> - improved reputation - cost saving through improved systems - differentiation of brand from competitors

<p><i>Management Review</i> 51 (3), pp. 95–113.</p>	<p>general theoretical study using case examples</p>		<ul style="list-style-type: none"> - focused, local and geographically dispersed social impacts - network expansion - innovation - improved ability to responded to NGO activism specific to firm through enhanced knowledge of community issues - access to specialised technology and training - protection/promotion of industry legitimacy - addressed infrastructure voids - improved communities - addressed threats to firm legitimacy from multiple sources/contexts - access to new markets - address complex threat to industries
<p>Seitanidi, M.M. 2010. <i>The politics of partnerships: a critical examination of nonprofit-business partnerships</i>. London: Springer</p>	<p>NPO – business partnerships, global, empirical study</p>	<p>content outcomes:</p> <ul style="list-style-type: none"> - financial support - image - profiling the organisation - support for mission - enhanced brand -gained reputation as a professional organisation within the business sector - learning – improved understanding of business through exposure to different sectoral culture <p>processual outcomes:</p> <ul style="list-style-type: none"> - additional financial support - technical expertise - capacity improvements - developed new partnerships - learning experience, evolution, opportunity to innovate - strategic approach to management 	<p>content outcomes:</p> <ul style="list-style-type: none"> - employee engagement - access to experts - CSR policy development - increased employee morale - employee development, retention and recruitment - profiling and certification as an industry leader - better access to decision makers - enhanced image and brand name - improved social capital <p>processual outcomes:</p> <ul style="list-style-type: none"> - developing constituency in addressed sector - trust from NGOs - better understanding of NGOs - development of goodwill - innovative products and service

		-change	<ul style="list-style-type: none"> - gained skills and expertise - networking opportunities - change
Kolk, A., van Dolen, W. and Vock, M. 2010. Trickle effects of cross-sector social partnerships. <i>Journal of Business Ethics</i> 94, pp. 123–137.	social partnerships – general/theoretical study	<ul style="list-style-type: none"> - resources – funds, volunteers, skills - visibility and publicity 	<ul style="list-style-type: none"> - corporate image - brand reputation - sales and firm performance - access to new markets
Porter, M.E. and Kramer, M.R. 2011. Creating shared value: How to reinvent capitalism - and unleash a wave of innovation and growth. <i>Harvard Business Review</i> Jan–Feb, pp. 62–77.	business and society collaboration – general – theoretical study	not addressed	<ul style="list-style-type: none"> - employee productivity and morale - cost savings from better use of resources and logistics - supplier access and viability - differentiation - efficiency gains - market expansion
Austin, J. E. and Seitanidi, M.M. 2011. <i>Value creation in business-nonprofit collaborations: Social enterprise series no. 32</i> . Harvard Business School Working Paper 12-019, pp. 1–94.	cross-sector collaboration – general overview – synthesis of theoretical and empirical studies	<ul style="list-style-type: none"> - financial support - increased visibility - credibility and opportunities for learning - unique capabilities and knowledge creation - increased public awareness of social issue - increase in support for org. mission - access to networks - technical expertise - increased ability to change behaviour - innovation - process based improvements - increase in volunteer capital - positive organisational change - sharing leadership - strengthening of social mission 	<p>enhancement of:</p> <ul style="list-style-type: none"> - company brand, reputation and image - corporate values - community and government relations - employee morale, recruitment, motivation, skills, productivity and retention - consumer preference - market intelligence and development - market, product, process innovation and learning - stakeholder communication and accountability - external risk management - competitiveness and innovation - adaptation of new management practices from interaction with NPOs <p>strengthening of:</p> <ul style="list-style-type: none"> • financial performance

			<ul style="list-style-type: none"> business sustainability
Al-Tabbaa, O., Leach, D. and March, J. 2012. <i>The impact of nonprofit-business collaboration: strategic implications from the nonprofit perspective</i> . 3 rd International Symposium on Cross Sector Social Interactions, 25 July, Rotterdam, Netherlands.	NPO-business collaboration – UK, empirical paper	<ul style="list-style-type: none"> - augmenting of social impact - enhancing operational capabilities 	<ul style="list-style-type: none"> - resources and capabilities (expertise, capital, networking)
NPO-business alliances studies – arts context (to include all types and stages of alliances)			
Hoek, J., Gendall, P. and West, R. 1990. The role of sponsorship in marketing: selected New Zealand companies. <i>New Zealand Journal of Business</i> 12, pp. 87–95.	corporate sponsorship, culture (amongst others), New Zealand, empirical study	not addressed	<ul style="list-style-type: none"> - improving goodwill - enhancing image - increasing awareness - improving profitability - staff recruitment
Scheff, J. and Kotler, P. 1996. How the arts can prosper through strategic collaborations. <i>Harvard Business Review</i> (Jan–Feb), pp. 52–62	strategic collaborations, arts, USA, synthesis of studies	<ul style="list-style-type: none"> - financial and noncash contributions - management skills/ expertise - increased volunteer pool - technological improvements 	<ul style="list-style-type: none"> - demonstrate good corporate citizenship - enhanced corporate image - enhance the business community's quality of life - goodwill among customer, clients and employees - employee retention and recruitment potential
Hitters, E. 1996. Arts support as corporate responsibility in the postindustrial city of Rotterdam, the Netherlands. In: Martorella, R. ed. <i>Art and Business: An International Perspective on Sponsorship</i> . London: Praeger.	corporate sponsorship, culture, the Netherlands, empirical study	not addressed	<ul style="list-style-type: none"> - marketing/public relations - improving stakeholder relations - enhancing brand recognition - employee benefits - cost reductions (tax deductions)
Arthur Andersen and Australia Foundation for Culture and the Humanities. 1999. <i>Making arts and culture work in business: the business case for cultural investment guide</i> . Melbourne, Australia: Australia Foundation for Culture and Humanities.	business and culture alliances, arts and culture, synthesis of best practice	not addressed	<ul style="list-style-type: none"> corporate legitimacy <ul style="list-style-type: none"> licence to operate corporate image corporate relationships access to investment funds market advantages <ul style="list-style-type: none"> direct sales brand awareness

			<ul style="list-style-type: none"> • customer attraction and retention • price premium <p>employee benefits</p> <ul style="list-style-type: none"> • productivity • recruitment and retention • skills and knowledge development • networking • organisational culture
Leclair, M.S. and Gordon, K. 2000. Corporate support for artistic and cultural activities: What determines the distribution of corporate giving? <i>Journal of Cultural Economics</i> 24, pp. 225–241.	corporate giving, arts and culture context, USA, empirical study	not addressed	<ul style="list-style-type: none"> - advertising - profitability - employees
O'Hagan, J. and Harvey, D. 2000. Why do companies sponsor arts events? Some evidence and a proposed classification. <i>Journal of Cultural Economics</i> 24, pp. 205–224.	arts sponsorship, Ireland, empirical study	not addressed	<ul style="list-style-type: none"> - improved company name and image - improved brand name and image - corporate hospitality - improved employee, supplier, customer and legislator relations - sampling - media coverage - increased sales
Quester, P.G. and Thompson, B. 2001. Advertising and promotion leverage on arts sponsorship effectiveness. <i>Journal of Advertising Research</i> 41(1/2), pp. 33–47.	corporate sponsorship, arts, Australia, empirical study	not addressed	<ul style="list-style-type: none"> - enhanced image - securing goodwill and licence to operate through improved attitudes towards the firm
Moir, L. 2004. <i>Why does business support the arts? Philanthropy, marketing or legitimization?</i> PhD Thesis, Cranfield University.	corporate giving, arts, UK, empirical study	not addressed	<ul style="list-style-type: none"> - client entertainment - reputation - marketing and branding - employee benefits and skills
McNicholas, B. 2004. Arts, culture and business: a relationship transformation, a nascent field. <i>International Journal of Arts</i>	arts and business collaboration – arts, Australia, empirical	<ul style="list-style-type: none"> - money - management expertise 	<ul style="list-style-type: none"> - corporate entertainment and hospitality - product or service promotion opportunities - marketing, PR and branding

<i>Management</i> 7 (1), pp. 57–69.	study		<ul style="list-style-type: none"> - enhanced corporate image through CSR and positive image transfer from arts association - creating goodwill among audiences and consumers – licence to operate - improved corporate communications effectiveness - innovation
Kivilo, A. 2005. Corporate Support for the Arts in a Small Country in Transition: the Experience and Motivation Factors for Corporate Patronage and Sponsorship in Estonia. <i>8th International Conference on Arts and Cultural Management 3–6 July, Montreal Canada.</i>	corporate patronage and sponsorship, Estonia, empirical study	not addressed	<ul style="list-style-type: none"> - improving image - employee relations - improving self-esteem and feel-good factor of management and employees - communication and marketing opportunities -linked to other business activities – networking
Arts and Business (A&B). 2009. <i>Fundraising factsheets: Series 1 Introduction to arts sponsorship</i> . London: Arts and Business.	arts sponsorship, UK, synthesis of theoretical and empirical studies	not applicable	<p>marketing:</p> <ul style="list-style-type: none"> • reaching key customers • shaping understanding • direct sales through advertising and product sampling • indirect sales through PR <p>direct access to target market:</p> <ul style="list-style-type: none"> • access to hard to reach audiences <p>enhance image:</p> <ul style="list-style-type: none"> • association with quality • build brand values and attitudes • image repair • differentiation <p>entertaining:</p> <ul style="list-style-type: none"> • corporate hospitality • staff relations and development • Staff incentives and volunteering • personal and professional development • corporate problem solving

			<ul style="list-style-type: none"> • innovation in business thinking <p>corporate affairs</p> <ul style="list-style-type: none"> • reputation • licence to operate • CSR/corporate citizenship
Arts and Business (A&B). 2009b. <i>Fundraising facts sheets: Introduction to arts sponsorship series – return on investment</i> . London: Arts and Business	arts sponsorship, UK, synthesis of best practice	<ul style="list-style-type: none"> - connections to the community - audiences - voluntary labour - skills development of staff - press and media coverage - brand recognition and awareness - reputations assessment - new contacts and networks - reduced costs - increased revenues - standing and reputation in the cultural sector, community, funders and businesses - regeneration effect; etc. 	<ul style="list-style-type: none"> - connections to the community - reputation assessment - communication of brand value - brand recognition and awareness - new contacts and networks - press and media coverage - improved dialogue across business - employee morale, cohesion, skills development - corporate hospitality - regeneration effects/contributor - encouraged people to have a career in that sector - business rankings - differentiation from competitors

Appendix 2: Macro level benefits studies

Macro Level Benefits in NPO-business (to include building the business case for CSR/sustainability studies and arts benefit studies)		
General context	Context	Benefit
Austin, J. E. 2000. <i>The collaboration challenge: how nonprofits and businesses succeed through strategic alliances</i> . San Francisco, USA: Jossey-Bass.	NPO-business alliances – community development and environment in the USA	<ul style="list-style-type: none"> - expanded community service - increase in community social capital and citizenship through increased paid-for time allocation of business employee volunteering and their sensitising to social needs of others - behavioural change of partners and other institutions they influence - ability of NPOs to provide and further their offering
Nelson, J. and Zadek. S. 2000. <i>Partnership alchemy: New social partnership in Europe</i> . Copenhagen, Denmark: The Copenhagen Centre	social partnerships - general overview – European context	<ul style="list-style-type: none"> - local economic development - job creation - community infrastructure regeneration - improved quantity or quality of services and better access to these services - improvement to health and education services and standards - decrease in violence and crime - better ethnic tolerance and celebration of all aspects of diversity in the community and workplace - overall improvements in quality of life - strengthened citizen awareness and realisation of the ability to participate in shaping and realising own future
Peloza, J. and Falkenberg, L. 2009. The role of collaboration in achieving corporate social responsibility objectives. <i>California Management Review</i> 51 (3), pp. 95–113.	CSR collaboration (business-NGO), general theoretical study using case examples	<ul style="list-style-type: none"> - consensus of priorities among powerful social actors - improved communities - infrastructure development - combining skills and expertise across sectors - reduced environmental footprint of business - improved sustainability of farming, incomes, and livelihoods of people - improved local economic and education systems - establishment of best practice across industry regarding codes on process safety, environmental protection, community awareness, emergency response, and occupational health management - legislation changes: responsible codes of conduct - establishment of a foundation for specific cause
Lim, T. 2010. <i>Measuring the value of corporate philanthropy: social impact, business benefits, and investor returns</i> . New York, USA: Committee Encouraging CP.	corporate philanthropy – synthesis of theoretical and empirical studies	<ul style="list-style-type: none"> - behaviour change of the beneficiary in the particular social issue (e.g. use of malaria nets) - betterment of the particular social issue (e.g. lives saved)

Seitanidi, M.M. 2010. <i>The politics of partnerships: a critical examination of nonprofit-business partnerships</i> . London: Springer	NPO–business partnerships, global, empirical study	social: <ul style="list-style-type: none"> - ability of NPO to further its mission - improvements in operation policies resulting in safer participatory environment - educating business employees of the NPO's mission - improved services due to improved technical skills and expertise - provision of additional projects societal: <ul style="list-style-type: none"> - influencing and shaping industry benchmark and policies regarding issue addressed - improving communities of business location - create a blueprint of innovative practice for other businesses to follow
Porter, M.E. and Kramer, M.R. 2011. Creating shared value: How to reinvent capitalism – and unleash a wave of innovation and growth. <i>Harvard Business Review</i> Jan–Feb, pp. 62–77.		<ul style="list-style-type: none"> - energy and raw resources savings - preventing accidents - improved educational opportunities - improved farming processes and product quality - improved communities - providing services and products for the disadvantaged
Austin, J. E. and Seitanidi, M.M. 2011. <i>Value creation in business-nonprofit collaborations: Social enterprise series no. 32</i> . Harvard Business School Working Paper 12-019, pp. 1–94.	cross-sector collaboration – general overview – synthesis of theoretical and empirical studies	societal betterment that provides benefits beyond the collaboration individuals <ul style="list-style-type: none"> - improved beneficiaries welfare - strengthening social, political and economic organisations that produce social value - contributions to welfare enhancing systemic change in institutional arrangements; societal relations, priorities, values; produce innovations - direct and indirect customer benefits - reduction of pollution, deaths - improved environmental standards - creating and encouraging new industry standards - developing community infrastructure - increasing employee volunteering bank - developing a foundation for community initiatives
Arts context		
Moir, L. 2004. <i>Why does business support the arts? Philanthropy, marketing or legitimization?</i> PhD Thesis, Cranfield University.	corporate giving, arts, UK, empirical study	<ul style="list-style-type: none"> - developing community and being a corporate citizen - education
McNicholas, B. 2004. Arts, culture and business: a relationship transformation, a nascent field. <i>International Journal of Arts Management</i> 7 (1), pp. 57–69.	arts and business collaboration – arts, Australia, empirical study	<ul style="list-style-type: none"> - innovation - city and regional development through arts dividend and creative capital

Appendix 3: Breakdown of secondary documents used in study

Orgs.	Event Observation	Document Analysis
Arts		
IMS (A1)	Annual Awards Ceremony x 3	- IMS website http://www.itsmyshout.co.uk/ - 16 files: 100 documents
	Talk at university	- 2 x DVD: The Making of: IMS 2010; Made in Wales: Making of 2011
	Film set/location	- Made in Wales: Premiere and Awards 2011 brochure
	visits at IMS	- various short films produced between 2006 and 2012
A2	n/a	- website - initial A&B Sponsorship Proposal; - A2 and B2 Sponsorship Proposal; - Evaluation by A2 Year 1 and Year 2 - email provided by A2c: brief synopsis of documents; - 2 press articles collated by researcher; - 2 publicly available youtube.com videos of workshops B2 - Annual Report 2008 and 2010 - ACW: A2 Annual Review Report 2009/10 - Report: A project to expand and enhance A2 - Volunteer Usher Application form – includes A2 background
A3	n/a	- A3 Mission - Sponsorship agreement 1 – A3 & B2 - Sponsorship evaluation 1 – A3 & B2 - Sponsorship agreement 2 – A3 & B2 - Sponsorship evaluation 2 – A3 & B2 - Festival leaflet - Summer 2012 Programme with corporate friends listed - Cinema Listings March–April 2012: B2 Principal Sponsor - 3 x sponsorship ideas for B2: 2010; 2011; 2012
A4	n/a	- website - workshop and programme leaflets
A6	n/a	- website
A5	n/a	- website - spring 2009 programme
Business		
B2	Talk at university research group, given by B2b.	- website - Directors' report and financial statements 2002 & 2003 - Annual reports 2004- 2011 - UK Best Places Workplaces Special Report May 2009 - UK's Best Workplaces Special Report 2011
B1	n/a	- Newsletter Winter 2011/2012
B4	n/a	- CSR website - document detailing approach to collaboration
B3	n/a	- annual report and financial statements 2011 - overall project report and 8 individual project reports for arts partners - project research report: A3 2009 - 3x copy of community involvement programme (CIP) – impact survey - CIP: intranet site printouts; CIP: impact report graphs

		<ul style="list-style-type: none"> - 6 CIP project outlines for 6 different arts centres - 6 x CIP reports of year 1
Consultancy		
<i>consultancy</i>	n/a	<ul style="list-style-type: none"> - Investing in Success - 2006 –2012 awards brochures

Appendix 4: Copy of email – initial contact with IMS

Dear Mr Burnell

I am a Doctoral Researcher at Cardiff Business School, where I am carrying out research into cross-sectoral social partnerships in the arts/creative industries context. I was given your contact details by a friend of mine, xxxxxxx, who recommended you to be the person for me to contact at It's My Shout Productions.

To give you a bit of background as to who I am: I'm in the second year of my doctoral programme at Cardiff University. My research is funded by the UK's Economic and Social Research Council. As part of my funding, last year I completed a Master's Degree in Social Science Research Methods, where in my final dissertation I investigated the motivations behind business funding of the arts. I worked with some of the leading corporate arts supporters in South Wales, as well as with two performing arts companies in Cardiff. The quality of my research has been widely recognised and I am due to present the findings at the forthcoming Academy of Marketing Conference in Coventry, as well as at the Corporate Responsibility Research Conference held in Marseilles, France in September 2010. (please find a summary of the research attached).

This study forms an initial stage of my aforementioned doctoral research into cross-sectoral social collaborations. Throughout the initial research, both during the interviews with my study's participants and the analysis of publications provided to me by Arts & Business Cymru, It's My Shout Productions kept coming up as a highly successful initiative, very active in forming partnerships with different sectors.

Having now narrowed the scope of my doctoral research and looked further into the excellent work and results you have achieved over the last seven years, I'm convinced that It's My Shout Productions would prove an excellent resource and a prime case study for my research.

I was wondering if it would be possible for me to arrange a meeting with you and/or your colleagues to talk about whether It's My Shout Productions would be interested and willing to participate in my research, as well as how this could be achieved. I would very much value an opportunity to learn from you about what happens and how things are managed in day-to-day practice.

My research supervisors at Cardiff University are Dr Tony Ellson (ellsonjt@cardiff.ac.uk) and Dr Fiona Davies (daviesfm@cardiff.ac.uk), should you wish to verify the credentials of my research.

If you require any further information about my research or any other aspect of my studies, please do not hesitate to contact me on my mobile xxxxx or by email: knighth@cardiff.ac.uk . Alternatively, you can contact my research supervisors on the email addresses above.

I very much look forward to hearing from you.

Best wishes,

Helena Knight
Doctoral Researcher

Cardiff Business School
Cardiff University
Aberconway Building
Colum Drive
Cardiff, CF10 3EU

Appendix 5: Theoretical Underpinnings of Observation, Interviews and Document Analysis

Observation

Observation is often rendered as the ultimate qualitative method in social research (Bryman 2008), particularly where the research problem centres on what people do (Saunders et al. 2012). It is also an instructive mode of entering the field with as few pre-conceptions as possible (Eisenhardt 1989). Daymon and Holloway (2002) suggest that observation can help the researcher familiarise with the field and provide initial understandings of the phenomenon, thus helping to focus the study, clarify research questions and identify key individuals, settings and documents that are most likely to provide deep understanding of what's happening. It points to rich areas suitable for further observation and interviewing, and assist with the cross referencing of the emergent themes.

According to Saunders and colleagues (2012: 340) observation involves "the systematic observations, recording, description analysis and interpretation of human behaviour." It's about trying to understand the processes through which people constantly construct and reconstruct their social realities. Exploring and examining the social reality through the participant's eyes is the basis of this method (Bryman and Bell 2011). It requires immersion in the research environment with the view of learning the language to gain an insight into the nuances of how people negotiate the meanings of their social reality (Van Maanen 1988). In interpretive traditions specifically, observation centres on understanding the process of action and interaction as opposed to being concerned with the frequency of certain actions and occurrences. Its expediency lies in the sensitivity to "temporal and contextual frames of reference" (Van de Ven 1992: 120) which may not be preserved in other methods and so helps externalise what might be taken for granted or subconscious (Bryman and Bell 2011), albeit Stake (1995) assigns contextual sensitivity as more pertinent to intrinsic case study.

Investigator immersion and contextual understanding of observation is seen as producing more authentic and plausible accounts of social phenomena (Golden-Biddle and Locke 1993), yet Blaikie (1993) questions this view and contends that investigator bias is likely to persist in that the researcher inevitably filters the account through their normative value frames.

Gill and Johnson (2010) distinguish between four types of participant observation, depending on the degree to which the observer participates in the social reality and whether the observed are aware that they are being observed: complete participant, complete observer, participant as observer, observer as participant. The choice lies primarily in the research questions, but other pragmatic considerations need to be considered. Saunders and colleagues (2012) outline the time, personal pre-disposition and experience, the question of access as well as the ethical considerations in terms of the degree of intrusion and conniving for research informants inherent in the covert participation as the decisive elements. Indeed, Langley and Tsoukas (2010) observe that observation is subject to time consuming efforts that can lead to the feelings of drowning in data, similar to those interview approaches face (McCracken 1988; Kvale 1996). The overt types are further affected by the 'reactive effects' where people may moderate their behaviour in the knowledge of the presence of the researcher (Bryman and Bell 2011). However, covert research denotes complex ethical implications. Bryman and Bell (2011) further posit that interviews pose a less obtrusive technique; they also allow for re-interviewing that can deal with aspects that may have been missed or need clarification. Observation is highly situated; it is also time and location bound to one person.

Fontana and Frey (2000) propose that multi-method approaches are best suited to studying the social world due to complexities with which people construct their lives. Schein (1984) maintains that organisational culture can be analysed at three levels: visible artefacts, espoused values and basic underlying assumptions. Although visible artefacts, such as public documents, are generally easily obtained, they can be difficult to interpret. Therefore, they are limited in discerning the underlying logic of why social actors behave the way they do. Although values that govern social behaviour are often considered, they are difficult to observe and so "it is often necessary to infer them by interviewing key members of the organisation or to content analyze artefacts" (Schein 1984: 3). Bryman and Bell (2011) conclude that some issues may simply remain hidden or are not observable and others may need clarification; talking to people is one of the key ways of find out about them.

In-depth Interviewing and Document Analysis

The interview, in its various forms, is deemed one of the most common and powerful ways to understand others and to gain insights into the societal complexities (see Atkinson and Silverman 1997; Bryman 2001; Fontana and Frey 2000; etc.). Atkinson and Silverman (1997) refer to a current 'interview society' phenomenon. Like observations, different types of interviews are applied by researchers, decisions of which are guided by the philosophical stance and research problem. Positivist research advocates structured interviewing as a way of explaining causality and patterns in the social world and variability in different phenomena (Bryman 2008; Saunders et al. 2012), yet this approach to studying human relations can only "scratch the surface of people's attitudes and feelings, where the complexity of human soul is lost through the counting of numbers" (Hill and Wright 2001: 435). In contrast, in-depth interviews resemble informal conversations with a purpose (Fontana and Frey 2000) where the interviewer steers the conversation towards the topic in an unstructured manner, constructing a monological view of the reality through joint collaboration of the varied perspectives of the interviewer and the interviewed informed by their personal biographies (Atkinson and Silverman 1997; Warren 2002).

Bryman (2008) notes that semi-structured interviews are invaluable where the aim of the research is to gain insights into how motivations, strategies and organisational structures are negotiated in daily encounters, through participants' perspectives. The flexibility of questioning allows the interviewee to talk freely about what they perceive as salient issues, whilst the structure helps the researcher to thoroughly explore the topic of inquiry, thus achieve purpose of the study. It is particularly useful to deal with access and time limit constraints inherent in elite interviewing where more in-depth exploration interview techniques suffer (Bryman and Bell 2011). It also allows researchers more credibility when gaining access, as they are able to give some information on the research topic, rather than sounding vague and unknowledgeable (Saunders et al. 2012).

The investigation ordinarily has a clear focus with the questions prepared prior to the interview and contained in an interview guide. The guide is used to help the researcher keep the conversation focused, but the sequence of questioning is flexible and open to change. The interviewer can decide which issues to pursue depending on individual encounters and interview responses (Daymon and Holloway 2002).

The individual semi-structured interview is marked by an ongoing debate about the capacity of the method to create knowledge from social actors' perspectives due to the stimulus-response format and the practicability of interviewer imposing their normative value frames on the interviewed. More genuine renderings, Jovchelovitch and Bauer (2000) suggest, can be elicited in narrative interviewing, where the interviewee is encouraged to narrate a story in their own language. Story telling forms part of constructing social phenomena as through talking, people reconstruct and make sense of their lived experiences (Chase 2005).

No single method is the key to understanding humans (Atkinson and Silverman 1997); the complexities and changeability of human lives require a range of methods and triangulation techniques in trying to make sense of the stories people tell us about them (Fontana and Frey 2000). Frey and Fontana (1991) posit group interviews as an efficient and effective mode of enriching the interpretation of social realities. The participants naturally correct each other, allowing for 'polyphonic' accounts leading to more holistic understandings. It also goes some way in reducing the interviewer's influence on the respondent as well as the subjective nature of the data typically raised as an issue in individual interviews (Frey and Fontana 1991), albeit not eliminating it (Geertz 1988; Van Maanen 1988). However, the issue of group dynamics related to opinion concealment or impression management needs to be accounted for.

The theoretical limitations raised are particularly problematic for researchers working within the positivist stance where subjectivity and researcher interference is rejected through the issues of validity, and to a certain extent impinges on the postmodern ethnographers' endeavours to preserve the perceptions of the respondents by minimising authorial bias. The constructivist interpretive paradigm, however, accounts for the author's voice and subjective interpretation. Interviews are seen as "the main road to multiple realities" (Stake 1995: 64) through which multiple views of the case emerge.

Despite the outlined strengths of the different types of interviews and their mutual complementarity in a research design, practical limitations require attention. The time consuming element and the potential for

"death by data asphyxiation" (Pettigrew, 1990: 281) is akin to that observed in observation. Similarly, access to interviewees who can contribute to rich descriptions can be problematic and frustrating, as recalcitrant respondents can also be (Frey and Fontana 1991; Mason 2002b).

These issues are outweighed by the depth of insight interviews offer, particularly where they form part of a multi-method approach (Denzin and Lincoln 2000a). Gerson and Horowitz (2002: 221) see observation and interviewing as complementary, offering "a richer, more complete, and more complex view of social life that either can offer on its own". Observation accounts for context and interviewing renders a more reflective nature of the participant's account of their views and understanding. In addition, Lincoln and Guba (1985) posit documents and records as a wellspring of information as they are recorded in the natural language for the respondent's own use, rather than being solicited by the researcher. Lincoln and Guba (1985: 316) further add that researchers need to ensure that data set is consistent enough to fulfil quality demand that "makes transferability judgements possible on the part of potential appliers". Whether explicit or undisclosed, the ubiquitous approach to gathering data by examining documents in research is raised by Stake (1995), whether its role is to guide interviews (Ryan 2006) or corroborate and validate findings (Mason 2002b).

Appendix 6: Schedule of interviews

Organisation Coda	No. of Interviews (No. of people)	People- code
Arts		
A1 Management Team	5 (2)	a x 3 – MD b x 2 – Projects Manager
Employees	1(1)	c x 1 – Community Projects Co-ordinator
Artistic Team	2(2)	LE x 1 – Mentor and Producer ML x 1 – Head of Department
A2 Management Team	4(3)	c x 1 – Head of Development a x 1 – CEO & Artistic Director b x 2 - Director of Marketing & Community Engagement Contacted Head of HR but too busy
Artistic Team	n/a	Contacted Artistic Director but unable to meet
A3 Management Team	2 (1)	b x 2 – Marketing Manager
Artistic Team	1	a x 1- Artistic Director
A4 Management Team	1(1)	CEO x 1
Business		
B2 Management Team	3(4)	b x 2 – Head of Communications a x 1 – Head of People Services c x 1 - Communications Manager b x 2 – Head of Communications d x 2 - Communications Officer
Employee Participants	3(6)	d x 2 HW x 1 - Communications Administrator, 7 years GS x 1 – Media Content Development Officer, 2 years - SG x 1 –Sales Representative, 2 years - JC x 1 – Senior Claims Analyst, 20 months - JW x 1 - Sales Representative/ Team Aid, 2 years
B1 Management Team	1 (2)	- b x 1 – PA to MD and CSR Committee, 2 years - a x 1 – Education Media Solutions/CSR Committee, 2 years
B3 Management Team	1(4)	- a x 1 – Community Affairs Managers - b x 1 – Community Affairs Executive - d x 1 – Researcher - c x 1 - PA & Employee Volunteering Co-ordinator
B4 Management Team	2(1)	CSR Manager x 2 (f2f, t) – CSR Manager
Employee Participants	2(2)	PR x 1 – Head of Department MP x 1 - Underwriting Customer Development Manager ex-employee recommended by PR but unable to contact.
Arts consultancy		
Management team	1(1)	CEO x 1
Participants		
A2 /A4 – Group 1	1(7)	DK, JR, FL, CR, RL, BC, MH
A2/A4 – Group 2	1 (5)	LR, AH, O, LJ, T,

A3 Participants		No response
A1 Participants	1 (2)	A, VS; plus video records participants
Additional Resources (MSc interviews)		
B6	1	Sponsorship and Events Manager x 1
B5	1	Community Investment Manager x 1
A6	1(2)	Administrative Director x 1 Publicity and Fundraising Officer x 1
A5	1	Head of Development x 1

Appendix 7: Breakdown of files and documents previewed at IMS.

File Name	Documents
IMS Film Training Scheme	<ul style="list-style-type: none"> - Press release introducing the scheme - contacts sheet - notes for award ceremony - showcase in Odeon cinema with a list of guests - letter from RWCMD confirming funding - ITV Wales relationship related documents
IMS 2007	<ul style="list-style-type: none"> - Kylie Cornelius invoice August 2007 – invoicing Bridgend CBC Art and Culture Service for work on It's my Shout August - Kylie Cornelius invoice July 2007 – invoicing Bridgend - A&B contract - new website launch
Welsh Assembly Plan 2008	<ul style="list-style-type: none"> - email from Clare Hudson – Wales @ BBC, subject: Young at Art Session @ Norwegian Church Cardiff Bay - note on meeting with Clare Hudson on 8th Oct 2008 and with Eleri Williams
IMS Business Plan	<ul style="list-style-type: none"> - IMS Business Plan - IMS Outline of Expansion - IMS Advisory Board meeting record of proceedings - IMS Communications plan
IMS Promotions and Marketing	<ul style="list-style-type: none"> - clippings and notes from various media including radio, newspaper and local newsletter
Taps Cymru	<ul style="list-style-type: none"> - documents on relationship
Premier 2008 and Awards	<ul style="list-style-type: none"> - plan for premier 2008 (shows table bookings) - guest list for 2008 - IMS Premier 2007 (lists attendees and sponsors)
Film Agency Wales	<ul style="list-style-type: none"> - funding agreement – final contract - terms of contract - IMS Exhibition Film Project objectives - breakdown of allocation of grant - key performance indicators - funder benefits expectations - letter from FAW confirming funding
Sony Partnership 2008	<ul style="list-style-type: none"> - partnership proposal - outline of benefits for Sony
Welsh Broadcasting Trust 2008	<ul style="list-style-type: none"> - funding application (details scheme's partners and particulars of each relationship)
SkillSet Screen Academy Wales	<ul style="list-style-type: none"> - various documents relating to the relationship (2007 review meeting minutes, 2008 evaluation meeting minutes, email exchange regarding student feedback, letter from SSAW regarding partnership issues, etc.)
2009 Funding Agreements	<ul style="list-style-type: none"> IMS and Blaenau Gwent Council Agreement IMS and Bridgend Council Agreement Arts Council Wales funding grants for 2009 and 2010
IMS Accounts	<ul style="list-style-type: none"> various documents relating to financial affairs

Appendix 8: Generic interview guide for each subset

a) Participants

1. Benefits of art to society?
2. Personal gain from attendance?
3. Personal view on businesses involvement in funding the arts?
4. Collaboration with arts organisations - obligation of business to society? Responsibilities?
5. Name [arts venues] business partners/sponsors? Opinion on relationships?
6. Reasons of arts organisations to collaboration with businesses? Benefits?
7. Businesses benefits?
8. Benefit to the local community in Cardiff?
9. Negatives associated with these relationships?
10. How have you learnt all that you know about this subject?

b) Employees

Topic Areas	Questions
Facesheet Info – general and specific	Make note of name, gender Job title and seniority? Length of service?
Arts sponsorship generally	Awareness of arts organisations supported by company? How have you learnt about these programmes? Company benefits? Arts organisations benefits? Benefits for wider community? How is this achieved? Any other individuals or organisations that benefit from collaboration between arts and business?
Personal attitude	Personal view on company's arts sponsorship policy? Any effect? Personal importance?
Employee questions	Workshop/project participation. Why participate? Motivations and expectations? Did it make any difference to you? Contribution to professional development? Effect on performance? Personal development? Benefits to the company of participation? Intended to? Personal views on the responsibilities of business towards society? Role of arts collaboration in CSR? Attendance at arts/cultural venues sponsored by company? How have you learnt all that you know about this subject?

c) Arts Managers

Facesheet Info – general and specific	Make notes on name, gender, background – education and career? Job title and reporting line? Length of service and managing collaboration?
Organisation Background	Can you tell me more about [name of org.] and its mission and goals? Specific overall objectives? How does the organisation go about achieving them? Evaluation? How/Why not? Most relevant groups of people with any form of stake in the organisation's success? Rank them a) their impact on [org]; and b) [org's] on their success/well-being?
Corporate Funding Generally	Increase in collaboration in arts context. Why is this happening? Personal philosophy on business funding the arts and culture? Influence of corporate support on the arts? Positives/negatives? Why do you think businesses engage in forging relationships with arts organisations?

Corporate relationships	<p>Economic goals when engaging in arts support?</p> <p>Current and past corporate supporters? Process of establishing relationship? Type of current support? Benefits sought by partners?</p> <p>Specific criteria requested for the relationship?</p> <p>Evaluation? What aspects?</p> <p>Business partners help to achieve mission (benefits for org.)?</p> <p>Negative impacts of relationships with business? Sacrifices? Costs?</p> <p>Role in achieving the sponsors' commercial success? Negatives for business?</p> <p>Beneficiaries of relationships overall? How are the benefits created?</p>
Specific sponsorship relationships	<p>Relationship formation? Champion?</p> <p>Did you consider whether this was a good match?</p>

d) Business Managers

Facesheet Info	<p>Name, gender, education, job title, reporting line?</p> <p>Length of service; length of managing arts partnerships?</p>
Arts sponsorship generally	<p>Role of business in our society?</p> <p>How is CR understood at the company? Impact on company behaviour?</p> <p>How does arts sponsorship fit into this? Related to overall corporate policy?</p> <p>What is your personal philosophy on business funding the arts and culture?</p> <p>Goals of arts funding? Key benefits? Any costs?</p> <p>Beneficiaries of relationships? Relationship between company and these groups?</p> <p>Beneficiaries benefits? Benefits to society from collaboration?</p>
Relationships with A3	<p>Background to relationship with [arts orgs]. How did it commence? Fit?</p> <p>Purpose, the aims and objectives of this relationship?</p> <p>What reasons did [arts org] give you for wanting to forge a relationship?</p> <p>Role of arts partner in company commercial success?</p> <p>Role of company in helping [arts org] to achieve their mission?</p> <p>Negatives of relationship?</p>
Evaluation and Promotion	<p>Evaluation? (probe for business and social impact).</p> <p>Internal/external promotion?</p> <p>Impact on the company if the relationship suddenly ended? Interested parties?</p>
Personal values	<p>Personal interest in the arts?</p> <p>Personal philosophy on business funding the arts?</p>

e) Consultancy

1. Mission and goals? Role in collaboration? Why arts and business collaboration?
2. Key stakeholders of relationships? Beneficiaries of collaboration? Benefits?
3. Arts organisations' criteria? Role of businesses in helping arts organisations to achieve their mission?
4. Business motivations? Collaboration role in commercial success of businesses?
5. Evaluation? Individual/joint? Aspects of evaluation?
5. Any wider public benefit?
6. Changes in relationships? (benefits sought, evaluation efforts)

Appendix 9: Research Ethics Form

CARDIFF BUSINESS SCHOOL ETHICAL APPROVAL FORM: PHD THESIS RESEARCH

(For guidance on how to complete this form, please see <http://www.cf.ac.uk/carbs/research/ethics.html>)

For Office Use:	Ref	Meeting
<p>Does your research involve human participants? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If you have answered 'No' to this question you do not need to complete the rest of this form, otherwise please proceed to the next question</p> <p>Does your research have any involvement with the NHS? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>If you have answered 'Yes' to this question, then your project should firstly be submitted to the NHS National Research Ethics Service. Online applications are available on http://www.nres.npsa.nhs.uk/applicants/. It could be that you may have to deal directly with the NHS Ethics Service and bypass the Business School's Research Ethics Committee.</p> <p>Name of Student: Helena Knight</p> <p>Student Number: 0611660</p> <p>Section: CARBS</p> <p>Email: knighth@cf.ac.uk</p> <p>Names of Supervisors: Dr. Tony Ellson, Dr. Fiona Davies, Dr. Sue Peattie</p> <p>Supervisors' Email Addresses: ellsontj@cf.ac.uk, daviesfm@cf.ac.uk, peatties@cf.ac.uk</p> <p>Title of Thesis: Strategic Alliances between Business and the Arts: The Value proposition of corporate arts sponsorship</p> <p>Start and Estimated End Date of Research: 1st September 2011 – 1st May 2013</p> <p>Please indicate any sources of funding for this research: ESRC I+3 Award</p>		

<p>1. Describe the Methodology to be applied in the research</p> <ul style="list-style-type: none"> - Analysis of a set of case studies publically available on Arts and Business website to pre-test a proposed theoretical framework - Media analysis using Newsbank Database, supplemented by company external communication materials (press releases, webpages) analysis, to examine how sponsorship of social issues is portrayed in the public domain - Qualitative face to face semi-structured interviews with key stakeholders of the sponsorship dyad (top management team (TMT) and employees of the sponsor organisations; the sponsored organisations; users of the sponsored organisation representing public views) to examine how sponsorship as corporate responsibility approach is understood and interpreted by different stakeholder groups. <p>Sample questions (to be tailored to each stakeholder group): What is your philosophy on the role of business in society? What do you think, personally, the responsibilities of business towards society are? Can you give me some examples? Why do you think businesses become involved in social issues? What makes you say that? What are their motives? What criteria do you think apply and who defines them? Who do you think benefits? How did you learn all you know about this subject? Is it acceptable for businesses to pursue economic goals when engaging their communities? Do you think they are purely self-interested or do you think they truly care and wish to help out? Where do you think corporate sponsorship fits? Do you think there might be different types of sponsorship? Can you name me some examples? How do you think they differ?</p>

2. Describe the participant sample who will be contacted for this Research Project. You need to consider the number of participants, their age, gender, recruitment methods and exclusion/inclusion criteria

- Purposive sampling in terms of a mix of judgement and theoretical sampling will be used throughout to select interviewees most likely to provide relevant information for the intended aim.
- Top management teams responsible for implementing and managing sponsorship of social issues in businesses selected using judgement sampling
- Cross-section of business employees selected through cooperation with the TMT. Criteria for selection to include equal number of employees with less than 1 year, 1-5 years, and over 5 years length of service, representatives of all levels of seniority up to TMT level, both participants and nonparticipants in the initiatives.
- Management team responsible for managing sponsorship relationship in the recipient organisations, selected using theoretical sampling
- Users of sponsored organisation will be selected from personal networks of the researcher and supplemented by participants recommended by the sponsored organisations.

The aim is to gain a holistic understanding of sponsorship of arts and culture as a tool for creating mutual value, as opposed to the management practice of a single entity and so exact numbers cannot be established a priori. Sampling will be carried out on an ongoing basis until theoretical saturation is achieved. Effort will be made to ensure that the overall sample is reasonably balanced in terms of homogeneity and heterogeneity, in that all participants impact or are impacted by this form of sponsorship, but they differ in terms of their stakeholder group and thus each group is likely to display different needs and norms.

3. Describe the consent and participant information arrangements you will make, as well as the methods of debriefing. If you are conducting interviews, you must attach a copy of the consent form you will be using.

- All participants will be fully briefed about the purpose of the study and a consent form will be presented at the beginning of each session.
- A consent form for the focus group participants will be discussed at the beginning of the session. The form (attached) outlines the purpose of the study, explains how the data will be used, gives guidance on potential complaints procedure and outlines anonymity principles. Attention will be drawn to the option of applying for a summary of key findings.
- A consent form will be presented at the beginning of each interview. The forms (attached) outline the purpose of the study, explain how the data will be used, give guidance on potential complaints procedure and provide information regarding anonymity issues. Attention will be drawn to the option of applying for a summary of key findings.

4. Please make a clear and concise statement of the ethical considerations raised by the research and how you intend to deal with them throughout the duration of the project

Corporate sponsorship of social issues has become a highly competitive area with many organisations often competing for funding from the same source. Caution will be applied when handling information, either during data collection or in publication that could interfere with the companies' competitiveness.

Media analysis and company communication channels are publicly available either via internet or in hard form. Care will be taken that the documents are not misrepresented in any way in the study findings.

Sensitive information may be obtained during data collection. Participants will be asked questions about their personal values and principles in relation to business involvement in the social sphere, which may cause discomfort to some participants. In addition, the employee stakeholders will be asked questions about the organisations they work for. Every effort will be made to ease any discomfort and to ensure that any sensitive information is not taken out of context and/or misinterpreted, in order to protect the individual person and/or the company they represent from subsequent personal harm or damage to their career and/or reputation. Care will be taken to ensure that any sensitive information will be held confidentially and anonymously so that only the researcher can trace the information back to the individual participant.

The research will be guided by the ESRC Framework for Research Ethics and the guidelines as set out by Cardiff Business School Ethics Committee will be fully observed through all stages of the research.

5. Please complete the following in relation to your research:

		Yes	No	n/a
(a)	Will you describe the main details of the research process to participants in advance, so that they are informed about what to expect?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b)	Will you tell participants that their participation is voluntary?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c)	Will you obtain written consent for participation?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d)	Will you tell participants that they may withdraw from the research at any time and for any reason?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e)	If you are using a questionnaire, will you give participants the option of omitting questions they do not want to answer?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(f)	Will you tell participants that their data will be treated with full confidentiality and that, if published, it will not be identifiable as theirs?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(g)	Will you offer to send participants findings from the research (e.g. copies of publications arising from the research)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PLEASE NOTE:

If you have ticked No to any of 5(a) to 5(g), please give an explanation on a separate sheet.

(Note: N/A = not applicable)

There is an obligation on the lead researcher to bring to the attention of Cardiff Business School Ethics Committee any issues with ethical implications not clearly covered by the above checklist.

Two copies of this form (and attachments) should be submitted to Ms Lainey Clayton, Room F09, Cardiff Business School.

Signed



Print Name

HELENA KNIGHT

Date

18/10/2011

SUPERVISOR'S DECLARATION

As the supervisor for this research I confirm that I believe that all research ethical issues have been dealt with in accordance with University policy and the research ethics guidelines of the relevant professional organisation.

Signed



(Primary supervisor)

Print Name

TARYN ELSON

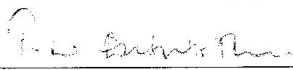
Date

24/10/2011

STATEMENT OF ETHICAL APPROVAL

This project has been considered using agreed School procedures and is now approved.

Signed



(Chair, School Research Ethics Committee)

Print Name

Peter Entwistle

Date

23 November 2011

Appendix 10: Consent Form

CARDIFF BUSINESS SCHOOL RESEARCH ETHICS

Consent Form – (Confidential and Anonymous Data)

I understand that my participation in this project will involve taking part in a group discussion/face to face interview (delete as appropriate) relating to arts and business collaboration.

I understand that participation in the study is entirely voluntary and that I can withdraw from the study at any time without giving a reason.

I understand that I am free to ask any questions at any time. If for any reason I experience discomfort whilst answering questions, I am free to withdraw or discuss my concerns with the researcher or with Dr Anthony Ellson (ellsontj@cf.ac.uk) who is supervising this study.

I understand that the findings of the study will form part of a PhD thesis and may also be included in academic papers and other publications at a later date.

I understand that the information provided by me will be held confidentially and anonymously so that it is not possible to trace any information or comments back to me individually.

I understand that, in accordance with the Data Protection Act, the audio recording and/or transcript of this discussion may be retained indefinitely.

I also understand that at the end of the study I may request information and feedback about the purpose and results of the study by applying directly to the researcher (knighth@cf.ac.uk) or to the University.

I _____(name of participant and company name) consent to participate in the study conducted by Helena Knight of Cardiff Business School, under the supervision of Dr Anthony Ellson.

Signed:

Date:

Anonymity: Yes / No

Appendix 11: Structure and scope of IMS

The organisational structure of IMS and the inherent processes are characterised by dynamism, driven by ongoing endeavours of Roger Burnell to forge an extensive network of alliances. IMS regularly communicates the strong collaborative focus:

“It’s My Shout could not exist without the partnerships we have forged and developed over the... years. We pride ourselves on the individuality of each and every partnership at every level...” (IMS 2009)

IMS also enjoys the support of a multitude of personal supporters, amongst who is the First Minister of Wales (FM), Carwyn Jones:

“[IMS] is a scheme that gives so many people an opportunity to discover the talent they’ve got, to learn a new skill and in the future, to use that skill to get themselves a job... I don’t know of any other project that really helps young people to get to grips with new skills and new learning.” (Carwyn Jones, First Minister of Wales)

The First Minister endorses the work of IMS at every level and is a regular attendee of the annual showcase. His passion is shared by another eminent personal supporter, Steve Dalton, a Managing Director at Sony UK:

“[IMS] is a very very important scheme to gather lots of different people from different areas, across different age groups, from all communities in Wales and let them come together as one. And where they can learn lifelong skills.” (Steve Dalton, Managing Director, Sony UK)

Remit

The scheme provides practical training and enables individuals to work alongside respected industry professionals across a diverse range of areas including acting, set design, camera, scriptwriting, producing, location management, hair and make-up, marketing, sound, music, event management, chaperoning, directing, costume design and editing.

Although initially set up as part of a local authority’s mandate to cater for those who would otherwise not have access to the artistic spheres in the society, the scheme today is a free-standing entity that raises awareness of the potential within the creative industries and offers a range of training opportunities to anyone interested in the arts and creative industries, particularly the film and media.

Expertise

The scheme has been recognised for its innovative and diverse relationships with businesses and for its work with young people as an example of best practice both in Wales and UK-wide. Within the Welsh creative sector, IMS was awarded the top prize for an arts organisation, the Legal and General Arts Award, at Arts and Business Cymru Awards 2008 for its work with a variety of business partners. Concurrently, ITV Wales won the best business partner award for its work with IMS. In 2009, Barclays Bank won the Arts, Business and Young People category for its collaboration with IMS to develop a money management programme for young people.

IMS is highlighted in a recent report by the Department for Culture, Media and Sport reviewing the government film policy, as one of three exemplary schemes that “encouraged the development of a greater diversity of talent across the UK” (DCMS 2011: 72).

The quality of the short films produced and the professionalism of the trainees has also been recognised on an industry level, with several nominations for BAFTA Cymru awards since the scheme’s inception. The film Owl Creek Bridge was awarded the prestigious best short film by BAFTA Cymru in 2008. Many films have been screened at numerous UK and international film festival, having been nominated and winning a number of accolades.

Appendix 12: Analyses of evolutionary stages of IMS

a) Analysis of Forming Stage

The forming stage is marked by the formulation of the social mission and the development of the tactics used to achieve it. BCBC's objectives related to inclusion of marginalised groups can be seen as the antecedent factors behind the establishment of the scheme, although human factor forms a fundamental role in the mission's wellspring, focused on arts-based training to socially excluded young people.

The mission reflects a keen focus on dealing with social problems caused by youth unemployment in the UK during the late 1990s and early 2000s, reaching the heights of 39% in some areas of South Wales (Walkerdine and Jimenez 2012). The deliberate changes in the macro environment caused by the dissolution of heavy industries in Wales in the late 1990s (Walkerdine 2010; Walkerdine and Jimenez 2012) as part of the transformational efforts of the UK government from secondary to tertiary or service sector economy (BERR 2008), can be seen as social constructions that inherently altered the long established social processes, giving rise to the necessity to provide alternative provisions. IMS was established by one of the affected local authorities to counteract the impact of outer contexts on the organisation level processes (Pettigrew 1997).

However, the forming stage firmly points to Roger Burnell's personal values, beliefs and experiences as the driving force behind the mission that aims to engage marginalised youths through the arts: "This [inclusiveness] ensures richness and diversity, which is key to the project and it is a huge tribute to the great Roger Burnell..." (anon, Annual Showcase 2011). By engaging in enjoyable and arguably appealing creative activities, IMS trainees benefited from a chance to develop hard and soft skills that could lead to a career in the creative industries. Coming largely from disadvantaged backgrounds, the trainees received a unique source of voice to express their viewpoints, as encountered in their respective communities (c.f. LeBer and Branzei 2010a). What is evident in this early stage is that besides developing creative talent in the disadvantaged social stratum, the scheme stimulated creative activity in the disadvantaged communities of South Wales. This points to the emergence of indirect benefits or value slippage (Lepak et al. 2007; Kolk et al. 2010) for the wider community, although the benefits were largely short-lived, arisen and expended during or very shortly after the benefit stimulating activity (Brown 2006).

As the mandate was held by the local authority, the initial contacts with the private sector largely provided an opportunity to create additional provisions for the target audience and, due to the industry alignment, to enhance the creative expertise and opportunities available to the trainees. The very first cross-sector collaboration with Barcud Derwen Studios, facilitated by the scheme's first external champion, saw the organisations exchange generic resources. This initial collaboration with the private sector is characterised by the business partner assuming a role of a benefactor investing in and/or helping out a newly formed socially oriented organisation in need of support. The financial and in-kind support can be seen as extemporised, yet highly welcome, benefits for IMS.

In return, Barcud Derwen received some basic marketing related benefits, mainly in the form of ad hoc branding and intermittent publicity, but due to the limited resources and expertise of IMS in this stage, little beyond the executives' short-term personal feelings of satisfaction of contributing to improving societal conditions is accrued on the business side. No direct societal collaborative benefits were created beyond those for the collaborating partners.

The societal value in this stage is created by IMS, with the business partner assisting IMS to realise its social mission (Austin and Seitanidi 2014). Entertainment and feelings of enjoyment from an artistic experience enriched the society momentarily on a micro level, with potential spill-over effects on the macro level through social contagion (Kolk et al. 2010). Target beneficiaries benefited from access to the creative societal spheres which are otherwise difficult to reach and a degree of life skills, to include vocational skills, were accrued.

However, the reach of IMS in the forming stages can be seen as extremely limited. Therefore, only very sporadic improvements in stagnant communities carried a potential for episodic enhancement of the respective community's life.

The final period of the forming stage is characterised by the re-positioning of the mission towards inclusive skills training for media and television, both vocational and interpersonal, for young people from all social strata. The extending of the mission beyond the socially disadvantaged, as a result of the progress in creative development that was endorsed by various bodies within the creative industries, demonstrated emergent organisational learning in terms of core capabilities. Moreover, the quality of the creative output indicated the scheme's potential to create benefits to the wider society in the form of entertainment.

b) Analysis of Learning Stage:

The learning stage is distinct by a high degree of internalisation of both organisational and collaboration specific learning that essentially laid solid foundations for advancement towards more valuable societal benefits. The expansion of the target audience and the relationships developed with professional creative training bodies in the forming stage inherently demanded a more formal organisational structure and demarcation of the remit. The considerable growth in the network of partners and supporters, as well as expertise in developing creative talent in a diverse range of social backgrounds, including the alleviation of social deprivation through the arts and creativity, can be seen as having afforded IMS credibility as a professional entity.

The acceptance of collaboration proposal by the RWCMD and the SSAW conditioned by direct participation in the film productions substantiated the emergent professional reputation and credibility (Yaziji 2002; Al-Tabbaa et al. 2012). These newly established collaborations with further and higher education institutions, industry partners and professional bodies operating within the creative industries sector essentially enriched the ethos that centred on removing access barriers to the creative industries for less privileged youths by the vision to nurture creative talent in Wales more generally. The expansion was, therefore, a firm step towards satisfying both sides of the argument regarding the role of the arts in society. (see Carey 2005).

The ITV Wales collaboration that was purportedly initiated out of a desire to continue with the proven formula based on a fit between the young people and film and media training, evidently emerged as the primary vehicle that stimulated the changes manifested in this stage of the organisational development. The organisational fit in terms of the creative field, and more importantly the alignment of IMS's mission with ITV Wales socially oriented objectives facilitated that a programme that offered an innovative approach to training in film and media was co-designed by the partners.

What is evident however is that despite the apparent emergent capabilities at IMS to utilise distinctive resources to offer attractive propositions for the business partners to collaborate on a more advanced level, the personal relation between Roger Burnell and Roger Lewis and their convergence of views regarding access to creative industries was the fundamental antecedent behind the formation of this collaboration. Indeed, the human factor reported in literature to form a primary element in alliance formation (Austin 2000; Maon et al. 2010), can be seen as having facilitated the rapid advancement from the initially proposed transactional relationship towards embarking on a relationship based on a high degree of organisational integration.

Nevertheless, the advanced organisational capabilities of IMS were demonstrated in the improved magnitude of benefits generated. The immediate psychic satisfaction captured by the trainees was augmented by more impactful and long lasting benefits in the form of personal and vocational development, including a range of skills, personal and professional networks expansion, and the related improvements in future prospects and career opportunities. Moreover, the enhanced social standing and sense of meaningful existence, combined with the improved personal aptitude, invariably contributed to developing a solid locus of control (Lefcourt 1982) that is required to move towards self-actualisation (Maslow 1954). The progression of Kylie Cornelius-Rees from an administrative role to a professional creative role facilitated by the ITV Wales collaboration evidently enabled her to embark on a journey that eventually saw her fulfil her aspirations in the creative sector.

The dual remit that saw the mixing of trainees from different social and cultural backgrounds in a mutually valued endeavour evidently acted as a vortex for breaking down barriers stemming from stereotypes inherent in societal stratification. Working together in pursuit of mutual goals enabled the trainees from different social environments to gain an understanding and mutual appreciation of their respective backgrounds, and improved the trainees' awareness of the different barriers and opportunities inherent in a social status

(c.f. LeBer and Branzei 2010a). It also carried the potential of expanding social networks in areas that otherwise may not have been available.

A similar transcending of social networks demarcation can be seen in the mentoring of the trainees by the professionals from ITV Wales. As employees of a high profile broadcaster, the unique opportunity to mentor and work with young people from diverse social and cultural backgrounds as part of their work duties generated emotional benefits of psychic satisfaction from contributing to opening up an industry that is typically seen as elitist, but also helped to broaden the employees' perspectives in terms of their understanding of the barriers existent in the society with regards to the arts and creative industries.

Moreover, the close working relationship can be seen as beneficial in terms of introducing the different sectors' employees into the workings of organisations and career opportunities in different societal sectors. The IMS team gained the required vocational skills for progressing the social mission and became familiar with the demands and work culture of a business that contributed to the development of stored capacity for future growth. Although to a limited extent, the ITV Wales collaboration is distinct by the first steps towards the co-creation of direct socio-economic value as an outcome of creating a new job opportunity for Rebecca Davies as a member of IMS management team. This appointment not only carried significant individual benefits for Rebecca Davies in terms of different emotional and practical, career related benefits, but it also strengthened the future growth of IMS. As is evidenced in the case study, this period was highly prolific in terms of new intra and inter-sectoral relationships formation.

The improvements in terms of personal locus of control and social stratification awareness can be seen as carrying the potential of spill-over effects on the wider societal level. People who feel in control of their lives are more likely to succeed and, therefore, contribute to societal wealth creation (Matarasso 1997). Likewise, an increase in the awareness of issues related to social stratification and cross strata social relations arguably constitutes an enhanced potential for a more balanced society.

A range of direct and indirect meso level benefits were accrued by the partners. The individual micro level benefits indirectly enhanced the collaborating organisations. The norms of social behaviour (Homans 1961), social exchange (Blau 1964) and reciprocity (Gouldner 1960; Masterson 2001) can be seen as having driven the individuals' commitment to their respective organisations, as well as their productivity in work. The residual macro level benefits linked to the micro level trickle effects (Kolk et al. 2010), such as the perceived enhanced community atmosphere and community relations, provided both partners with more favourable and stable operating environments. The exchange of generic resources, including cash for IMS, and image and reputation enhancement for ITV Wales as a result of a demonstrable CSR commitment, were extended by a range of direct long-term impactive benefits.

IMS benefited from a base at the broadcasting centre and the staff developed a range of skills that were crucial for future growth. The expertise improved through an acquisition of knowledge of the practical workings of a broadcasting company and the required capabilities in film production. The high profile of ITV Wales further increased the scheme's visibility and the extensive network of ITV Wales carried compelling opportunities for further growth. IMS also benefited from an increase in its volunteer base when a number of ITV Wales staff became dedicated mentors to the trainees.

ITV Wales was provided with a unique way of reaching young people and identifying new talent and its staff developed mentoring skills and an awareness of the conditions related to access to the creative industries that informed its future CSR agenda. Both companies reduced their respective risk propensities and IMS did this by securing a more stable operations and a CSR related 'shield' for potential future threats for ITV Wales (Klein and Dawar 2004; Vanhamme and Grobben 2009; Smith et al. 2010).

Although "still control[led] whether, when and how" by those "seeking to address the needs of the marginalised", through combining unique capabilities from very early on, the collaboration augmented the innovative approach to affording voice to the marginalised communities (LeBer and Branzei 2010a: 607). The 'voice giving' is evidenced in the process of the generation of this benefit. IMS discovered talented young people from atypical backgrounds and afforded them to tell their story whilst ITV Wales worked on progressing it, and broadcasted the output on national television, fully credited as produced by IMS trainees.

Despite the mediating factor by the dominant actors, the broadcasting not only helped to raise awareness of the mission the collaboration was pursuing, but also of the social issues raised by the trainees in the films. Beyond the lasting benefits for the target beneficiaries, the increased awareness evidently represents cumulative value for the partners. IMS utilised the increased awareness of the mission in its subsequent growth, and ITV Wales furthered their reputation and license to operate through direct involvement in abating pressing social issues (Moir and Taffler 2004).

Although both organisations accrued both temporary and enduring benefits, this stage is distinct by an imbalance in the magnitude of benefits generated for each partner. The significant developments in core capabilities and organisational learning at IMS facilitated by the relationship and/or as a direct outcome of the relationship suggest that the business partner remained largely in the investor position.

Moreover, in terms of benefits for a wider society, although a degree of enduring macro benefits related to Rebecca Davies' employment and the opportunities provided for the scheme's trainees were co-created by the partners, the trainee pool was relatively small and confined to the South Wales geographical area as dictated by the mandate holder, to allow for the generation of highly significant external cumulative societal value. The wider society benefited mainly from entertainment opportunities co-created by the partners through producing and broadcasting the twelve short films, generating transient societal value.

The majority of the societal value external to the collaborative actions of IMS was created by IMS alone through its community outreach programme that generated largely temporary benefits on micro, meso and macro levels both directly and through residual contagion or trickle effects (Kolk et al. 2010), where the partners, including ITV Wales, remained in the role of benefits facilitators. Overall, the emerging phase is characterised by the growing ability of IMS to co-create temporary benefits across all levels within and externally to IMS and its alliances, yet the co-created long-term, enduring benefits evidently remained focused internally.

c) Analysis of Transferring Stage

The developments in the transferring stage essentially built solid foundations for the scheme to 'fly the nest' and engage fully in societal betterment by establishing as an independent entity with a capability to make significant contributions towards socio-economic value creation. The learning stage facilitated the initial understanding about the requirements in cross-sectoral collaborations and the worthwhile prospects of engaging the private sector strategically.

The independent status that marked the emergence of the transferring stage provided the crucial flexibility that stimulated unprecedented developments in terms of expertise, competencies and core assets. The noted growing track record of significant achievements, including the creative output both human and artistic product wise, socio-economic outcomes, as well as the growing portfolio of partners in the transferring stage, instigated a distinctive advancement that positioned IMS as a more equal partner to the private sector, capable of participating fully in creating distinctive opportunities for its partners and society, as opposed to remaining in the role of a value receiver distinguishable in the ITV Wales collaboration (LeBer and Branzei 2010a).

In this stage, the ITV Wales collaboration was evidently strengthened by a rise in mutual trust and commitment. This advancement, manifestly facilitated by the social relations that developed between the partners' leaders, the individual employees and amongst the trainees and ITV mentors since the inception, is consistent with the views of Austin (2000: 128) that "the more personal the relationship glue, the stronger the alliance's cohesion " where the 'glue' gets stronger with the increasing points of connection, and Bowen et al. (2010: 306) who assert that regular interactions lead to personal relations based on mutual understanding and trust, where value "is more likely to be created through engagement which is relational rather than transactional". The increased interconnectedness linked to the incorporation of IMS, both physical and expertise wise, within the ITV Wales broadcasting centre; and essentially the high quality output in the form of festival nomination for best short film, and the trainees securing employment and/or further education in the creative industries, exemplify further factors that purported the progress.

It is evident, however, that in terms of the more enduring organisational level benefits, the resource flow was largely unilateral, from ITV Wales to IMS. The largely generic resources deployed by IMS that offered traditional marketing related opportunities, employee entertainment and incentives, and opportunities for networking linked to the invitations to the showcases, typically result in short-term, episodic improvements for the business partner. The majority of meso level benefits capable of creating long-term organisational value were captured by IMS, as can be seen in the access to ITV Wales' professional network that led to the collaboration with Arts and Business Wales, which in turn gave rise to a number of subsequent highly potent collaborative value creating collaborations with the private sector.

The support of ITV Wales was also instrumental in the modification of the status and structure of IMS, which resulted in the transformative process based improvements that progressed IMS towards the aforementioned position of a collaborative value co-creator (Seitanidi 2010; LeBer and Branzei 2010a). The high profile mentors and personal supporters, wide range of partners, and regular broadcasting of the short films on ITV Wales equipped IMS with a lever to induce significant levels of publicity and awareness, and offer the potential partners an access to a unique web of networks. Combined with the demonstrated expertise in, and tacit knowledge of, the creative industries and the social issue it was tackling, IMS in this stage matured into a desirable partner for community engagement programmes within the private sector.

The cumulating properties of the benefits accrued from expanding the professional network of the scheme by influential partners is demonstrated by Arts and Business facilitating the collaboration with Barclays Bank. The facilitation enabled Barclays and IMS to identify a unique fit without having to go through the introductory stages (Austin 2000) and the issue related to trust and commitment was overcome through the a priori established relational trust with Arts and Business. This collaboration was evidently a forthright transactional relationship not intended to develop into a long-term collaboration, yet, as can be seen, it yielded a mix of societal benefits across the loci and levels of collaborative value creation (Austin and Seitanidi 2014). IMS benefited by receiving a one-off financial contribution, but it was also provided with business expertise that was invaluable in terms of the re-structuring process that marked the closing period of this stage. The financial support eased the cash flow and thus enabled more resources, both human and material, to be invested in holding workshops that offered opportunities for fun and creative development. The business focused workshops led by Barclays employees benefited trainees in terms of business and financial education and so facilitated significant transferable skills development.

In return, the employees of Barclays enjoyed participating in the creative workshops and production of the short films, and benefited by developing different vocational and extending existing soft skills. All individuals involved were afforded a chance to broaden their perspective, whether in terms of socialising with people from different social strata and so gaining an understanding of the different barriers present and/or becoming exposed to different working cultures and career opportunities across business and civil society sectors. Significant direct outcome of this collaboration that generated wider socio-economic benefits on the macro level were the new businesses set up following the business focused workshops. Likewise, other organisations, such as the National Theatre of Wales and various production companies such as BBC, Sky, Boomerang and the Film Agency Wales gained from a rich pool of professionally trained creative people fully conversant with the traditional self-employed and freelance employment culture (skillset 2012).

The accumulated core competencies, to include the experience of working with partners in the private sector, together with a developing reputation of IMS as an enterprise that provides valuable opportunities to disaffected young people in South Wales, initiated the formation of the Sony alliance. The role of the human factor is evident throughout the formation and implementation phases of this collaboration (Austin 2000; Seitanidi 2010). The collaboration formed following an introductory meeting facilitated by the scheme's personal supporter, who recognised that the leaders' personal values and beliefs in terms of providing opportunities to young people in creative industries overlapped. There was an alignment in terms of the organisation's locality which can be seen in the experience between IMS and Sony. The formation, selection and initial design were all agreed during this meeting, and the stages "greatly overlap and interact" (McCann 1983: 178), which is inconsistent with Seitanidi and Crane's (2009) belief that the formation and implementation are distinct, stepwise stages.

The initial largely unilateral resource flow from Sony to IMS typified the introductory stages of alliance building (Austin 2000; Rondinelli and London 2003; Bowen et al. 2010). It allowed the new partners to become familiar

and to identify the potential sources of resource alignment and compatibility. The deepening social relations between the alliance protagonists and the leaders' shared worldviews and interest in opening up the creative platform to a wider audience can be seen as having played a crucial role in the steady progress towards increased integration. The opportunity for Sony's executives to experience first-hand the positive impact of the scheme on the trainees at the annual showcase provided a degree of psychic satisfaction from contributing to societal betterment. In accord with Austin (2000: 58) "Motivating through direct service exposure or engagement is highly effective in creating a connection". Creating opportunities for frequent interactions across many points contributes to the emergence of relational forms of trust (Bowen et al. 2010) beyond those of the alliance gatekeepers (Austin 2000) which helps in embedding the alliance within the organisation (Seitanidi and Crane 2009; Maon et al. 2009). The experience also helped to identify the most effective form of collaboration, lending support to Austin (2000) that shared activities clarify the partners' capabilities and resources and so shape future possibilities for an alliance.

The Sony collaboration directly influenced the scope of micro and macro level benefits towards the end of the transferring stage, where the social orientation of the scheme was being overshadowed by the professionalization efforts at IMS. The conditioning of any further development of the relationship on a continued engagement of marginalised young people evidenced in this stage marked the instigation of the re-balancing efforts. Forming one of the fundamental blocks of the scheme's ability to operate independently, Sony essentially ensured that the scheme continued to progress along its unique dual mission, creating benefits for individuals and society in both the creative sphere and on community level.

d) Analysis of Enterprising Stage

The perceived departure from the initial focus on social inclusion resultant from the professionalising efforts linked to the expansion of the scheme and its portfolio of partners in the latter parts of the learning stage, typifies the growth stages of a majority of enterprises established with a social mission (Yunus and Weber 2010; Pirson 2011). The influence of the private sector partners can be seen as one of the primary forces that helped to re-establish the social objectives alongside the professionalising efforts. Although the dual objectives pursuit is typically seen as carrying a threat of diluting the essential focus and may become detrimental to the mission (Pirson 2011; see also Jensen 2002), the partners' insistence on community engagement essentially contributed to the development of a highly specified mission. The unique combination of core assets derived from an expertise in both community engagement and short film production undergirded by a unique, well-developed network of influential partners spanning both the artistic and the social spheres, and all societal sectors, positioned IMS as a distinctive innovative entity within the creative industries as it entered the enterprising stage.

Overall then, the enterprising stage was particularly turbulent in terms of the development of the scheme itself, as well as in terms of the collaborative efforts. The series of peaks and troughs in the fortunes of IMS explicate the distinctive role of the private sector partners, whether assuming a role of a benefits' facilitator or a benefits' creator, in steering the mission of the scheme and its capacity to improve societal well-being. The departure and subsequent return of Kylie Cornelius-Rees as one of the key figures at IMS is a primary example of the impact of the partners on the social value creation capacity. The role of the human factor in sustaining the accumulated socio-economic collaborative value became particularly pronounced in this stage. The unique core capabilities and distinctive capacity to generate socio-economic impact in collaboration with the different partners in the form of highly impactful combined temporary and enduring benefits on the micro and meso levels internal to the collaborations became fully operationalised, with the macro level benefits gaining on scale as well as magnitude.

The Arts and Business Cymru awards presented to IMS, as well as to ITV Wales and Barclays for their continued support of IMS, substantiated the credibility of IMS as an instrumental partner for the private sector and contributed to the CSR related image and reputation building efforts of ITV Wales and Barclays. Similarly, the BAFTA Cymru award generated significant high impact benefits on all levels. The individuals involved in the production of the award-winning film essentially moved closer towards self-actualisation through recognition at the top platform in their desired field (Maslow 1954) and improved their personal locus of control (Lefcourt 1982). The professionally recognised creative output further assisted the trainees in securing industry specific careers, whether in terms of actual employment or further development opportunities.

On an organisational level, benefits in the form of an enhancement of image and reputation were generated as an outcome of the considerable publicity the awards attracted. Organisational credibility was also enhanced for the organisations by demonstrating their respective capabilities, as well as the ability to integrate them to create effective alliances. The sense of pride experienced by the individual employees directly involved constitutes a potential to secure employee productivity and commitment (Turban and Greening 1997, Bhattacharya et al. 2008, 2009; Gond et al. 2010), and also acts as a lever for generating positive word of mouth about the company by its employees (Drumwright 1996; Bhattacharya et al. 2008, 2009; Gond et al. 2010; Vock et al. 2011). Indirectly, the trainees and other network members gained a sense of satisfaction from an affiliation with an award-winning entity. Externally to the dyads, the wider society was provided with a high quality product for entertainment purposes, artistic heritage got enriched and the communities that were afforded voice in the films benefited from increased awareness and recognition of a legitimate claim.

The key events that impacted this stage are marked by the inextricable influence of the external factors on the internal context's ability to partake in societal improvement. In spite of the highly integrated ITV Wales collaboration boasting some significant achievements in terms of socio-economic impact, the financial crisis experienced within ITV Wales caused by the economic recession that predominated the external environment in this stage, marked an abrupt termination of the relationship. Despite the considerable level of integration within the local ITV Wales offices, the collaboration lacked the same level of integration and senior executive support at the holding company, ITV plc., based in London. This experience is in concord with literature that suggests that although personal relations can strengthen relationships (Austin 2000; Berger et al. 2004; Bowen et al. 2010), to safeguard a relationship long-term, it is necessary to ensure that it is firmly embedded within both organisations (Maon et al. 2009; Seitanidi and Crane 2009) and that the support of the top level executives is secured (Austin 2000; Maon et al. 2008).

Many further suggest that asymmetrical power relations in a cross-sectoral relationship that were omnipresent in the IMS and ITV Wales relationship typically suppress the ability of the weaker partner to affirm equal control over the relationship's development, and so over the process of accumulating long-term societal value (Yaziji 2002, 2004; Berger et al. 2004; Salamon 2007; LeBer and Branzei 2010a). The lack of experience on the part of IMS in terms of how to leverage the unique capabilities to create value, as well as the deficiency in ability to clearly communicate and defend the cumulative value of the alliance to ITV, is consistent with Berger et al.'s (2004: 64) findings that "too little initiative... can end a partnership", regardless of whether the unawareness of the value rests with the NPO, or in the lack of aptitude to assert it to ignorant corporate managers.

What is evident in this relationship is that, although the relational bonds between the different individuals from IMS and ITV Wales ensured that the dissolution was courteous, in accord with Seitanidi and Crane (2009: 415) that "the test of embeddedness of the relations is assessing the impact of crises within organisations", the shortfall in integration of IMS beyond the local level at ITV and the inaptitude of IMS to clearly communicate and defend the value of the alliance to ITV, proved destructive to the relationship. The resultant disruption and struggle for survival that IMS experienced in the aftermath clearly demonstrate the threat that incompletely institutionalised relationships pose to societal betterment. The highly detrimental impact on the enduring benefits occurring in the virtuous circle came close to eradicating the 'stored' societal value accumulated over the years of successful collaboration.

However, personal commitment and shared interest in the scheme's mission is evidenced as the fundamental factor that safeguarded the scheme from collapsing in the aftermath of the ITV Wales collaboration ending. Although relying purely on actor bonds and personal relations for sustaining collaborative relationships is myopic (Austin 2000; Maon et al. 2009; Seitanidi and Crane 2009; Knight 2010), the human factor is shown to function as one of the principal factors in societal value creation (Drumwright 1994, 1996; Hemingway and MacLagan 2004; Hemingway 2005). The crossing over of Elis Owen from ITV Wales to BBC Wales at the end of the enterprising stage and the immediate resumption of his role as the scheme's champion, as well the increased dedication of Lisa Edwards to the scheme in her role of a mentor following the disengagement, can be seen as restoring some of the cumulative value disrupted in the formal alliance ending. Elis Owen ensured that IMS was fully integrated within the BBC Wales strategy and Lisa Edwards, in addition to her mentoring role, assumed the role of a producer and casting co-head for IMS.

Personal relations, and shared interests and values, further figure as the central antecedents in the establishment of the initial links with BBC Wales, as demonstrated in the event of Menna Richards from BBC Wales offering Roger Burnell the position of a talent consultant. In this case however, although the personal rapport sparked the initial connection, the resultant transformative collaboration was achieved by determining a mission fit between the organisations. As the case study demonstrates, IMS mobilised the enduring benefits in the form of a network of dedicated partners to develop a business plan that clarified the balance between the professionalising and social aims of the scheme. It clearly communicated the unique expertise and achievements, and helped to explicate the in-depth tacit knowledge of the field within IMS. With the help of the business partners, IMS was able to present its mission as highly congruent with the BBC Wales community outreach programme.

The establishment of the BBC Wales collaboration and the resultant perceived associational and interaction value (Austin and Seitanidi 2012a), *inter alia*, facilitated the return of Kylie to the scheme. Apart from directly benefiting the managerial aspects of the scheme, this development enabled the regaining of the lost tacit knowledge and restoration of the virtuous circle of benefits in terms of her mentoring role and innate knowledge of the scheme, suffered after her departure.

The annual showcases by this stage of the organisational progress can be seen as a compelling platform for securing significant long-term benefits at different categories of the micro level. In addition to showcasing the vocational skills, the trainees were provided with unique opportunities to exploit the enhanced interpersonal skills to develop personal associations with influential individuals from the industry, vital for gaining a foothold in the fiercely competitive creative sector. It also provided the representatives from the varied partner organisations with networking opportunities with executives from other partnering organisations, as well as with the high profile supporters from within the creative industries and the public sector in an informal setting, in the backdrop of a mutually appreciated cause.

The enhanced awareness, and image and reputation building accolades arisen from the growing collaborative efforts of the partners in this stage can be seen as transgressing onto micro and macro levels, respectively. The individual advantage can be seen in some of the trainees securing career specific development and employment on the back of the professional reputation of IMS. This in itself can be seen as a benefit to creative organisations external to the collaboration, but also facilitates the sustainability of the creative industries. The growing accomplishments in terms of socio-economic impact and the resultant positive publicity stimulated further support from the business partners.

What is notable here is that the different roles the business partners assumed, depending on the type of support provided and the level of fit identified between the organisations, influenced the type of involvement in social benefits creation. Despite acceding to the role of the main corporate partner during this stage, Sony supported IMS largely through financial, in-kind and expertise in the form of arm's length support without direct participation in generating of the social benefits. Beyond the introduction of Dragon Digital Intermediate to IMS and their subsequent collaboration on the film production through which new film production technology was learnt at the scheme, thus further explicating the enduring benefits related to a powerful network of partners, IMS benefitted largely in the form of an improved cash flow. The benefits captured by IMS subsequently trickled across to secure higher quality vocational training provisions for the trainees, as well as providing intermittent employment opportunities for individuals and organisations within the creative sector that were hired to help with the film.

The residual effect of the enhancement of IMS operations and training provisions also provided richer artistic experience for the general public, with the wider community benefiting from temporal improvements in community atmosphere through the norms of reciprocity and social contagion (Homans 1961; Blau 1964; Kolk et al. 2010). The social benefits on micro, meso and macro levels external to the collaboration dyads produced largely temporary value, where the role of the business partners transpired as one of a benefits facilitator.

In contrast, beside the largely generic resources, ITV Wales and Barclays engaged in relatively high levels of involvement (Austin 2000), to include the engagement of employees and, in the case of ITV Wales, the provision of a base. The uniqueness of the format of the film productions programme as an outcome of ITV Wales and IMS combining their core competencies, and the highly specified workshops organised as part of the Barclays collaboration, resulted in the direct co-creation of combined temporary and enduring 'storable'

benefits for the individual trainees and employees of the organisations involved in organising and running of the training events. It also directly benefited the organisations in the dyads by affording them an opportunity to offer more varied provisions for their customers (IMS) and employees (IMS, ITV Wales and Barclays).

The resultant successes in the form of awards and publicity, multiple forms of skills development, enjoyment, improved career opportunities, enhanced recruitment pool, improved employee relations, secured employment and self-employment, improved cross social stratification and cross-sectoral understanding, and enhanced social capital in terms of better functioning and more harmonious communities, etc., demonstrate the magnitude of the benefits achievable. Once constructive conditions are achieved that enable the business partners to progress from merely facilitating social benefits, to fully partaking in social benefits provision (Berger et al. 2004; LeBer and Branzei 2010a), the value accumulated from the combined storable micro level benefits can trickle within and across other levels (Kolk et al. 2010).

Despite the many positive indicators and the organisational development reaching maturity in terms of expertise and collaboration wise, the problematic financial situation inherent in the inadequate funding structure marked the ending period of this stage. The lack of a long-term strategic perspective to funding was further exacerbated by the ongoing and deepening global economic recession (Chew 2009). The increased operational costs brought about by the changes in the arrangements with BBC Wales and the responsibility for Kylie's salary highlighted the inefficiency and precarious nature of the ad hoc approach to the scheme's cash flow. The resultant reduction in the number of films denotes a decrease in the micro level benefits, particularly those to the target beneficiaries, which, in light of nascent research that sees individual benefits as the wellspring of all socio-economic benefits in cross-sector collaboration (e.g. Bhattacharya et al. 2009), impinged on the overall societal value creation potential.

e) Analysis of Transforming Stage

Overall, this period of the organisational development is characterised by systematic efforts to consolidate the considerable experience and organisational learning in order to formalise the organisational structure and processes that would help to initially diversify the funding streams to prevent the recurrence of the threats to the scheme's continuation and eventually move towards self-sustainability. The ad-hoc management and definite financial dependency on the respective business partner that inherently hindered Roger and Kylie's ability to negotiate partnering deals other than those linked to specific deliverables were gradually replaced by processes that reflected the espoused status as a professionally structured entity, fully cognisant of its value-adding capabilities. The licence to offer government accredited creative apprenticeships placements granted to IMS at the end of the transforming stage explicates the transformative influence of the cumulative value accrued over time from a combination of temporary and enduring benefits, to include the unique set of core competencies developed over time that resulted in an advantageous image and reputation; the multifarious accolades and acknowledgements; the distinctive network of powerful supporters and partners; and the extensive proven track record both in terms of creative socio-economic output and capabilities in co-creating societal value with the private sector partners.

However, the early period of this stage was marked by a reduction in the scheme's capabilities to partake in societal betterment. The intensified negative developments in the external environment towards the end of the enterprising stage significantly impacted IMS as it entered the transforming stage. The mis-structured funding programme became acutely pronounced as it became exceedingly difficult to replace the lost streams of income, as a result of the diminishing public sector funding revenues for socially oriented organisations (Chew 2009) and the reported 7 per cent drop in all aspects of private funding for the arts (Mermiri 2010). IMS was evidently experiencing the full impact of the unprecedented severity of the nature and scope of the recession that saw most entities operating a survival mode (McKinsey 2009). The experience of IMS is consistent with the promulgated views that the impact of the recession on arts funding required a focused strategic, but a highly sensitive approach to financial management by arts organisations with any cost savings being executed with a minimal impact on the artistic output (Mermiri 2010).

The scaling back of the scheme's scope in this period as a direct result of the problematic funding essentially reversed the steady evolution of the socio-economic benefits achieved since the scheme's inception. The reduction in new trainee positions and creative community workshops negatively impacted the future creation of the combined temporary and enduring micro level benefits on the trainee point, and the temporary micro

and macro level benefits accruable on the community level. The seemingly minor decrease in the desirable social benefits generation may be seen as negligible, however pertinent literature on cross-sector value creation indicates that undertakings that appear to favour organisational over social benefits generation may lead to sceptical reactions and a loss of credibility, if perceived by external observers as serving purely self-interested and window-dressing purposes (Hoefer 2000; Zadek 2004; Porter and Kramer 2006; Smith et al. 2010).

Literature further reports that any reduction in social provisions due to funding issues is typically viewed as failure to deliver both in terms of accountability (Hoefer 2000; Chew 2009) and responsibilities to the partners (Berger et al. 2006; Media Trust 2009). The resultant withdrawal of further funding inevitably leads to the disbanding of the enterprise (see Farrelly, Quester and Burton 2006).

The developments in the transforming stage, however, demonstrate that the IMS experience is inconsistent with the views that a lack of core funding inevitably leads to collapse. Moreover, the degree to which this temporary reduction in the social benefits generation was utilised to develop a distinctive strategy for the scheme explicates that although strenuous, the necessity to consider the efficiencies of the existing structure and processes may result in unique solutions to what otherwise may be seen as an insurmountable disposition, and indeed lead to unexpected increases in societal value creation. Moreover, the active approach to dealing with inefficiencies in the existing systems signals an awareness and willingness to improve (Zadek 2004; Porter and Kramer 2006; Maon et al. 2010). The silence of external observers regarding the reduction of the social benefits observed in the case study further indicates that temporary lapses in beneficial outcomes may not necessarily immediately result in accusations of window dressing and a lack of accountability, particularly if the events are fully justified; and/or the customary or, as was the case of IMS, enhanced value-adding efficiencies, are promptly resumed (Zadek 2004).

The early periods of this stage illustrate that the manpower freed up by the temporary reduction in social benefits generation enabled extra effort to be invested in developing the existing core private sector and broadcasting alliances. It essentially resulted in Roger Burnell securing a novel solution in the form of the apprenticeship programme that contributed towards longer term financial stability and sustainability. The Sony collaboration in this stage is characterised by a transformation towards a highly integrated relationship as a result of the deepening of the activity links, resource ties and social relations throughout the enterprising stage. The renewal of the sponsorship agreement indefinitely with the release of two years of funding at the outset of the new period of support firmly positioned Sony as the principal business partner.

The extended activity links that saw IMS approach Sony with a proposal to co-create a practical training programme for the trainees and apprentices demonstrates that IMS had matured into an entity firmly aware of its value adding capabilities on all levels (Berger et al. 2004). The opportunity to develop personal relations with the President of the Sony Corporation and the subsequent integration of IMS operations within the business partner's physical environment explicates the progress of the collaboration, where the mutual trust and commitment, secured via multiple and multi-level points of actor bonds and personal relations, ensured that the collaboration was firmly embedded within both organisations. The successful execution of the co-created programme through determining a mutually beneficial fit marked the emerging capability of the collaboration to co-jointly create innovative solutions.

The personal relationship that developed between the leaders as a result of their shared values and beliefs can be seen as the driving force behind the longevity of the relationship, as well as the steady progress towards the increased integration between the organisations. The experience between Sony and IMS in developing the relationship is consistent with the frameworks in literature that position close relations between the organisational leaders as an essential backdrop behind successful alliances (Austin 2000; Rondinelli and London 2003). However, as is evidenced in the developments in this stage where Kylie and the representative of the CSR team at Sony were tasked with managing the details of the execution of the alliance, as well as the unique training programme that led to raising of the awareness amongst Sony employees of the relationship with IMS, the experience further corresponds with the views that although the leaders' enthusiasm and support are important, true integration can only be achieved if and when the relationship penetrates deeper into the structures of both organisations and the wider employees' favour of the collaboration is secured. "The organisations, not just the leaders, must own the alliance" (Austin 2000: 124; see also Maon et al. 2009; Seitanidi and Crane 2009). As opposed to the ITV Wales relationship where the organisational learning of IMS

was still embryonic, the proactive approach to extend the relationship by maintaining open communication and proposing mutually beneficial ventures, as well as extending the points of contact on the leadership level beyond the locality, ensured that the societal value creation was fully exploited and secured.

It also further confirms that societal value creation is enhanced once the NPO's organisational learning evolves adequately to enable the progress from a reactive value receiver position to a role of a value provider, fully aware of its aptitude and resources to partake in societal value creation with the business partners (Berger et al. 2004; LeBer and Branzei 2010a).

The transformation into an equal partner in value creation capabilities at this stage is also reflected in the co-designing of the unique event for the Glastonbury festival with Film Agency of Wales, BAFTA Cymru and SkillSet Screen Academy. The ability to join forces with the high profile organisations on the Welsh creative scene provided a rare opportunity to present the artistic output, as well as explain the substantial outcomes and impact of the scheme to an international audience at a widely recognised and influential cultural event in the UK. Presenting the highly professional standard of film education, training and filmmaking in Wales on such a high profile platform directly benefited IMS in terms of raising awareness not only of the organisation itself, but also of the social issue the scheme pursued. It further helped to raise awareness of the role of the scheme's partners in tackling the issues.

The sense of pride, personal gratification and feelings of achievement experienced by the trainees, mentors, and employees of IMS and its partners following the screenings of the films on national television and at other festivals re-emerged and contributed to creating storable value on a micro level. Crucially however, this was the first time that an organisation pursuing a social mission external to the collaborative efforts of IMS directly benefited from the transformation that IMS had undergone in this stage. The Village Screen Project that housed this initiative at the festival benefited financially as well as by being able to offer a more varied, professional programme to its audiences. By partaking in the creation of combined benefits for external organisations, as can be seen in the strengthening of an entity that helps to promulgate creativity and its role in developing the society, IMS in collaboration with its network of partners demonstrate the capacity to extend storable social value for society.

This stage is also marked by the arrival of the top level political figure in Wales and his succession as the leading champion of IMS. Attracted by the growing reputation of IMS, the powerful position of the First Minister in terms of Welsh socio-economic life can be seen as a substantial strengthening of the scheme's network. Political goodwill is reported as one of the leading underlying motivations for corporations to engage in societal betterment (Young and Burlingame 1996; Moir and Taffler 2004; Porter and Kramer 2006; Knight 2010; Bowen et al. 2010), thus the leverage this expansion in the network of IMS appears particularly significant in the ability of IMS to retain and attract influential business partners. The business partners and the other creative industries partners found the opportunity to connect with the First Minister attractive and valuable. The highly desirable contacts within the network imply a significant organisational advantage for IMS as it provided the organisation with a potent lever in negotiating contracts. It also attracted publicity and increased awareness of the organisation and its mission. Although indirectly, the meso level benefits also accrued to the business partners in the form of an opportunity to discuss their wider business, providing a possibility to leverage the political goodwill to further business interests.

Becoming a provider of the Creative Apprenticeships Programme was the principal transformative development in terms of societal value creation in this stage, as by helping to re-establish creative apprenticeship provisions in Wales, IMS and its network of partners progressed towards the creation of benefits for the broader society. Through the pursuit of collaborative strategy, IMS in this stage created value that helped transform the educational standards for the creative industries in Wales. Beyond the Well-established benefits generated for the different individuals discussed in previous sections, the apprenticeships offered an officially recognised, structured and stepwise progression towards a career in the creative industries. Through the close working relationship of IMS with the respective partner colleges, the apprentices developed both academic and practical skills and knowledge related to their selected niche, whilst building up a professional portfolio, as well as expanding their professional network crucial for securing a career in the industry. The ability of IMS to successfully administer the apprenticeships scheme, whilst acting as the central point for the different partners partaking directly (Coleg Morgannwg, Sector Skills Council, Welsh Assembly Government) or facilitating it (e.g. Sony, BBC Wales, various local authorities), signalled the

advanced capabilities of IMS to handle complex collaborative action in pursuing societal betterment and highlighted its contribution to enriching the creative and artistic heritage (Googins et al. 2007; Wind-Cowie and Wood 2012).

What is evident however is that the experience between IMS and Sony is inconsistent with the ubiquitous view in cross-sectoral collaboration literature that sees synergistic value (Austin and Seitanidi 2012a) or shared value (Porter and Kramer 2011) capable of producing enduring benefits on a macro level, i.e. benefits beyond those generated for the individuals and organisations directly involved in the collaborative action, as commensurate with direct, equal participation of both partners in the process of societal value creation or the co-creation of societal value (Waddock 1988; Austin 2000; Googins and Rochlin 2000; Kurucz et al. 2008; Austin and Seitanidi 2012a.b).

Sony was not directly involved at any stage of the securing or implementing of the apprenticeship programme, and so, apart from the one aspect that saw apprentices engage in the corporate events, it was not actively engaged, and nor did it contribute equally, to the macro level value creation. However, the a priori evolution of IMS demonstrates that the ongoing, existential financial support that Sony bestowed on IMS was the ultimate factor that enabled IMS to progress to the position where it was capable of contributing to transforming societal betterment, placing it firmly in the loop of the value creation process.

The policy change at Sony that encouraged the idea to extend the CSR remit towards a paid-time employee community service volunteer programme, can be seen as further significant collaborative outcomes in this stage. Utilising the relationship with IMS in particular tendered advantages for the individual employees in the form of immediate personal gratification and enjoyment from the engagement in the film productions, a sense of personal satisfaction from helping a good cause and opportunities for self development, and social and professional network expansion. In terms of the individuals internal to IMS, the access to the volunteers from Sony denotes an attractive proposition for the trainees and IMS staff to access professionals working within the industry; a highly potent source for skills and network developments in the creative industries. On the organisational level, Sony was set to gain from an increased organisational identification from employees who value the mission of IMS, and an increased awareness of the community engagement programmes amongst the employees, reported to be the most effective form of CSR communication for corporations (Bhattacharya et al. 2008).

The inherent increase in manpower availability ameliorated the most pressing issues of deficiencies in terms of human resources for IMS, as well as affording direct access to business expertise required for the future strategic development. Crucially however, beyond the individuals and organisations directly involved in the collaborative action, this policy development at Sony facilitated by the organisational learning, constitutes a potentially major increase in the paid-time community volunteer service provision that indicates a significant macro level benefit for other organisations operating within the civil society sector. Further influence can be assumed at the societal level through the welfare enhancing properties of increased social provisions (Austin and Seitanidi 2012b), where the lack of manpower at charities and NPOs is reported as one of the key inhibitors of organisational growth in the civil society sector (Chew 2009; Farrelly et al. 2006).

What is noteworthy in the relationship between IMS and Sony, is that the collaboration specific learning not only pertains to IMS, but it is also directly observable in the experience of the Sony Technology Centre. Since the initial links made in the Transferring stage, Sony's reactive, cheque-signing attitude to CSR and community betterment progressed to a strategic approach. The long-term, progressive relationship with IMS that aims to re-structure the creative industries and remove the barriers stemming from societal stratification points to organisational learning that is approaching Zadek's (2004) civil stage where "companies promote collective action to address society's concerns" (ibid 2004: 127). The commensurate level of organisational learning indicates that although Sony may still be perceived as the dominant partner due to the persistent financial dependency of the scheme on Sony, IMS played a key part in driving Sony's CSR learning that represents highly potent, long-term value for the corporation. This confirms the nascent views in the literature that position NPOs firmly into the role of value producers "making far more significant contributions to the solution of public problems than existing official statistics suggest" (Salamon 2007: para. 2).

Consistent with pertinent research (Austin 2000; Rondinelli and London 2003; Googins et al. 2007; Bowen et al. 2010; Austin and Seitanidi 2012a), the transforming stage demonstrates that significant social change

typically develops from cross-sectoral relationships that evolve along a continuum where the resource flow, magnitude of resources, type of trust, degree of involvement, managerial complexity and type of value progressively transform from unilateral and transactional to mutual and relational. In particular, the experience of IMS undergirds the latent views that systemic changes that have a transforming impact on a wide range of people require alliances to advance to “multiparty collaboration” (Austin 2000: 107-110) or “multiorganisation” (Googins et al. 2007:), as addressing societal ills requires “cross industry and multi-sector co-operation” (Mirvis and Googins 2006: 118; see also Zadek 2004, 2008).

Appendix 13: Episodic and cached, internal and external benefits indicators

a) Internal Episodic Benefits Indicators

Episodic Benefits – Internal			
Micro		Meso	
executives	Emotional: <ul style="list-style-type: none"> - enjoyment - psychic satisfaction from contributing to social improvements - limited personal network expansion – socialising Practical: <ul style="list-style-type: none"> - limited professional network expansion 	arts partner	<ul style="list-style-type: none"> - financial and in-kind support - increased visibility (if communicated internally)– employees of business partner, customers, publicity - increased awareness - limited increase in volunteer capital - improved image (business partner halo effect)
employees	Emotional: <ul style="list-style-type: none"> - enjoyment - psychic satisfaction from contributing to social improvements 		
participants	Emotional <ul style="list-style-type: none"> - fun, enjoyment 	business partner	<ul style="list-style-type: none"> - promotion opportunities – advertising, product placement - corporate entertainment and hospitality - limited image building, reputation enhancement - network expansion – generic - employee entertainment and incentives

b) External Episodic Benefits Indicators

Episodic Benefits – External		
Micro – Indirect Beneficiaries	Meso	Macro
<ul style="list-style-type: none"> - sporadic additional provisions for the art partner's audiences and arts enthusiasts - sporadic, short-term improvement of sense of well-being within local community (e.g. excitement created in marginalised communities through filming taking place) - ad hoc improvement in customer service for individual business customers - sporadic employment opportunities for artists (artists hired on projects) 	<ul style="list-style-type: none"> - other organisations benefiting from sporadic improvements in sense of well-being in the locality (more activity in the community during filming creates better atmosphere, people come out together – local shops, cafe, etc. benefit). 	<ul style="list-style-type: none"> - ad hoc entertainment opportunities (e.g. ad hoc projects created through one-off financial contributions) - ad hoc creative development opportunities (e.g. workshops and film in Bangladeshi community)

c) Internal Cached Benefits Indicators

Cached Benefits – Internal			
Micro		Meso	
executive	<p>Emotional:</p> <ul style="list-style-type: none"> – enjoyment – psychic satisfaction from contributing to social improvements – self actualisation (personal fulfilment, sense of satisfaction and well-being, meaningful existence) – personal network expansion – socialising <p>Practical:</p> <ul style="list-style-type: none"> – professional network expansion – skills development <p>Dual:</p> <ul style="list-style-type: none"> – broadened perspective: <ul style="list-style-type: none"> ○ cross-sectoral understanding ○ social issues awareness ○ social stratification awareness 	arts partner	<ul style="list-style-type: none"> – stable and predictable financial and in-kind support – increased visibility and awareness – through direct involvement of employees of business partner, long-term publicity, partner networks – improved image (business partner halo effect) – credibility (proven track record of working with business) – development of unique capabilities and knowledge creation increased public awareness of the social issue – increase in support for organisational mission – access to networks – Sony, ITV, Arts and Business – technical expertise – Sony, ITV Wales, and Dragon DI – opportunities for innovation (productions HD and special effects) – opportunities for processes based improvements (business plan) – increased long-term value creation potential (long-term support creates stability for IMS to continually offer services and develop cached benefits at micro and macro levels) – increase in volunteer capital (through employees at ITV Wales and Sony becoming mentors, publicity in the media and screening of films)

employees	<p>Emotional:</p> <ul style="list-style-type: none"> – meaningful existence, enjoyment – personal development network expansion, improved sociability – improved social standing – psychic satisfaction from contributing to social development <p>Practical:</p> <ul style="list-style-type: none"> – professional development, future prospects – skills development (vocational, transferable) – professional network expansion – improved career opportunities <p>Dual:</p> <ul style="list-style-type: none"> – broadened perspective: <ul style="list-style-type: none"> ○ social stratification awareness ○ cross-sectoral understanding ○ improved social stratification awareness – locus of control (confidence, self awareness, aptitude) 		<p>on television)</p> <ul style="list-style-type: none"> – positive organisational change (leaving BCBC and incorporating as a socially oriented limited company allow IMS to grow and expand significantly, and essentially to become a government supported national film and television training scheme)
participants	<p>Emotional</p> <ul style="list-style-type: none"> – fun, enjoyment – improved personal locus of control (sense of empowerment, confidence, self awareness and aptitude) – personal network expansion <p>Practical:</p> <ul style="list-style-type: none"> – improved access to opportunities – skills development (vocational, soft, transferable) – professional network development – improved prospects (social, career) <p>Dual:</p> <ul style="list-style-type: none"> – inhibited social stratification barriers – voice affording (self-expression opportunity) – personal fulfilment – creative outlet provision 	business partner	<ul style="list-style-type: none"> – credible promotion opportunities (advertising, product placement, publicity linked to long-term support) – corporate entertainment and hospitality – access to varied networks through personal introductions – image and reputation enhancement linked to long-term support – improved pool of employees – better qualified/skilled employees – community and government relations – legitimacy through continual association with community organisation – employee relations (through engagement and incentives) <ul style="list-style-type: none"> • morale • recruitment • skills, motivation, productivity and retention

d) External Cached Benefits Indicators

Cached Benefits External		
Micro – Indirect Beneficiaries	Meso	Macro
<ul style="list-style-type: none"> – enriched provisions for the arts partner's audience members and arts enthusiasts generally (high quality films output, talented creative individuals provided training and career paths in artistic industries) – improved community life – civic pride – employment opportunities for wider arts community (e.g. paid mentoring, and/or consultancy positions) – improved customer service for business customers (through employee engagement) 	<ul style="list-style-type: none"> – other organisations benefiting from improved socio-economic standing of communities (community members more likely to spend or attend social occasions when positive). 	<ul style="list-style-type: none"> – civic pride –cultural capital – varied entertainment opportunities – creative development opportunities – thriving creative scene in the local community – sense of well-being within the local community – reduced vandalism, crime – improved cross-cultural awareness – improved cross-social stratification awareness – increased awareness of arts potential in social progress – improved educational opportunities (IMS as a national training scheme, apprenticeship scheme) – equal opportunities – employment opportunities in creative industries – creative industries sustainability –